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# HOUSING HANDICAPPED AND DISABLED PERSONS

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## A TRAINING MANUAL

By

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This Manual provides the information,  
materials, and instructions for  
training trainers to assist interested  
groups in how to plan and develop housing  
for persons with handicapping conditions.

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## INTRODUCTION

In May 1977, the National Association of Housing and Redevelopment Officials (NAHRO) sponsored a national prototype training institute on housing for the handicapped and disabled at the Kellogg Center for Continuing Education at Michigan State University in East Lansing, Michigan. Those who participated in the training institute came from diverse organizations that included local public housing agencies, state housing finance agencies, national organizations representing the physically and mentally disabled, officials from the Department of Housing and Urban Development, and training specialists (see appendices for a complete listing). Despite the diversity of backgrounds and knowledge in the subject area among the invited participants, a common commitment was the desire to help facilitate appropriate and humane living environments for physically or mentally disabled individuals.

A major purpose of the training institute, which was part of a larger NAHRO effort funded as a project of national significance by the Office of Developmental Disabilities of the Department of Health, Education and Welfare (grant #54P711313), was to test this training manual.

The NAHRO project was undertaken for a variety of reasons. Foremost among these was the recognition that meeting the special housing needs of handicapped persons, including the developmentally disabled, was evolving very slowly in the United States, particularly in terms of federally assisted programs. Unfortunately, most of the housing assistance opportunities for the handicapped have been directed to institutional housing settings such as nursing homes and homes for the aging. Despite the benefits of more normal living arrangements in



community-based housing, there has been very limited progress in providing independent housing for handicapped persons.

While handicapped persons are eligible for assistance under programs administered by the Department of Housing and Urban Development, neither the Congress nor HUD has developed specific guidelines for the design or operation of such housing. Nor has a methodology for determining either the housing market or the demand been investigated. Other deterrents have been the lack of specific guides in the location, design, and types of housing related to various impairments; the lack of expertise of housing agencies in the appropriate support services; and the lack of expertise of service agencies in the design and financing aspects of housing. Perhaps the major obstacle has been the lack of any mechanism or methodology for bringing specific knowledge on the housing requirements together with the supporting service needs of handicapped persons--with particular emphasis on those facilities and services that compensate for disability and make it possible to enjoy at least a partially independent life-style, i.e., how to meld the most effective housing setting with service programs.

Federal legislation now provides expanded housing opportunities for the disabled. The Housing and Community Development Act of 1974 for the first time specifically opens the eligibility of various housing assistance programs administered by HUD to the developmentally disabled in addition to the physically handicapped. The act also requires that housing projects meet acceptable standards of design and provide quality services and management consistent with the special needs of the occupants. A research and demonstration program for households with special housing needs was enacted as Section 815 of the 1974 act. A wide range of federal assistance for supporting



services, particularly for developmentally disabled persons, is now available under the Developmental Disabilities Services and Facilities Construction Act of 1970 and the Rehabilitation Act of 1973. Provisions of these acts authorize the Department of Health, Education and Welfare to assist in providing specialized services included among which are domiciliary care and special living arrangements.

Recent HUD initiatives have also furthered federal attention and commitment to housing for the disabled. Among these are the establishment of an Office of Independent Living within HUD, the earmarking of certain HUD assistance funds specifically for housing units for the disabled, and the more flexible use of existing HUD programs to create independent living environments.

The first phase of the NAHRO project was the development of a publication authored by Marie McGuire Thompson and published by NAHRO, entitled Housing for the Handicapped and Disabled: A Guide for Local Action, that provided comprehensive how-to-do-it information on the practical considerations entailed in the realization of housing for the disabled in non-institutional settings. The guide is the background and text for this training manual.

The second phase of the NAHRO project, the development of the training manual and its use at the prototype training institute, had three goals:

- To train trainers of other trainers so that the number of persons equipped to communicate knowledge in this area can be expanded;
- To train an initial cadre of governmental and nongovernmental trainers who can directly inform local groups about the plan-



ning, development, and management of housing for the handicapped and disabled; and

- To train resource persons within appropriate governmental and non-governmental groups, to carry out an information and referral service on housing for the handicapped and disabled to their constituents and other interested organizations and individuals.

The first goal was the primary one of the institute. By training trainers of other trainers it is hoped that eventually a nationwide network of trainers will emerge. The publication of this training manual is meant to help facilitate that process.

Since the training institute, a wide variety of follow-up efforts have been carried out by participants. These activities range from briefing sessions highlighting key issues in providing housing for the disabled, to entire conferences or workshops on how to plan and administer statewide community-based residential support programs for the disabled.

In many of these efforts, portions of the training manual or guide have been adapted or expanded to meet specialized needs of specific audiences. While maximum benefit in using the training manual lies in a full five-day training effort, time or money constraints of other trainers or groups utilizing the training manual may necessitate adapting portions of the training program to fit those constraints.

Special acknowledgment needs to be made of the time and efforts provided by those persons and organizations instrumental in the planning and development of this training manual and its initial testing and the prototype training institute. We are deeply indebted to the following groups who provide members for the NAHRO advisory panel for the total project--for their advice, counsel, and participation in the training institute:



Epilepsy Foundation of America

National Association for Retarded Citizens

National Association of Coordinators for State Programs  
for the Mentally Retarded, Inc.

National Association of Private Residential Facilities  
for the Mentally Retarded

Nation Easter Seal Society for Crippled Children and  
Adults

United Cerebral Palsy Associations, Inc.

Particular mention of the following individuals is also in order --  
Mary Nenno, NAHRO director of program operations; Wilma Donahue,  
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of the training institute; Veronica Bukowski, Janet Brown, and Patricia  
Rice Littman, who served as trainers in the institute; and last but  
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Judy L. Morris  
Project Director for  
Special Housing Services

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## PREFACE

There is growing recognition of the need to make available suitable, non-institutional living arrangements, in community and residential settings, for persons with handicapping conditions. There is also considerable interest among organizations for handicapped persons and various state and community groups sponsoring such housing.

The difficulty that is often encountered by these groups is that they are unfamiliar with the process and the procedures of developing the housing.

The National Association of Housing and Redevelopment Officials (NAHRO) recognizes both the need for appropriate, residential housing for the handicapped and the need for providing assistance with the development of the housing.

To help meet these needs, NAHRO has published a resource book on housing development, Housing for the Handicapped and Disabled: A Guide for Local Action, for use by interested groups in designing, managing, and servicing housing for the handicapped.

The manual is intended to provide the information, materials, and instruction needed to:

- 1- Provide training and assistance in how to plan for the development of handicapped housing and in how to use the guide in this development process; and
- 2- provide training in how to train others to become trainers in housing development.



The material in the manual is organized for easy use under the following sections:

Section I describes the purpose of the training;

Section II explains the focus of the training and the techniques for implementing it;

Section III provides guidelines for conducting the training program and for using the manual;

Section IV sets forth the program for providing the training;

Section V contains the training materials to be used in the program;

Section VI provides samples of the forms for recording and reporting the training activity and instructions for preparing them; and

Section VII discusses how to provide the necessary follow-up training.

The manual has been specifically designed to facilitate the training. It contains the complete program and accompanying materials and instructions needed to provide the training. It also presents the information in an easy-to-use format. The material is concisely stated in short paragraphs, and the paragraphs are numbered for easy reference during the training process. The relevant information in the guide is also cited, by page number, for each topic discussed, to enable the resource information in the guide to be used effectively and efficiently during the training. A wide left margin has been provided to allow space for the guide page citations and for the trainer to make notes.

By presenting all of the material needed to provide the training, and by providing it in an easy-to-use format, it is hoped the use of the manual and the training will be encouraged.



REPORT ON THE  
FIRST TRAINING  
EXPERIENCE

In May 1977, NAHRO sponsored a national training institute to further housing opportunities for disabled persons. The national training institute on housing the handicapped and disabled was convened by NAHRO for the purpose of initiating the training of a cadre of knowledgeable people to assist interested groups plan and develop suitable housing arrangements for the handicapped.

This week-long institute represented the first level of training in the overall training scheme. The persons attending the institute were given the charge of replicating the training in their geographic region, thus beginning the multiplication of training in this important area.

The institute brought together 45 interested persons from throughout the country who reflected a mix of backgrounds, representing organizations of handicapped persons, federal, state, and local housing agencies, and university training personnel. These people are to be thanked for their participation and valuable contribution to the training effort.

The training manual, as the tool for implementing the training effort, was first used and tested at the national institute. On the basis of the experience at that training, the manual was revised to accommodate the changes suggested by the training experience and by the participants and training staff. It is hoped future training sponsors will find the revised manual a practical guide in planning and conducting training institutes in their regions.

The first training experience, at the national institute, supported the need for providing training in the area of housing development for the handicapped population and supported the value of focussing on the process of achieving housing as a practical and feasible approach to increasing the housing opportunities for disabled persons.



The first training experience also raised other important points to be considered in sponsoring housing for the handicapped.

1- There was strong support for a conceptual framework for the development of housing opportunities for handicapped people on the philosophy that persons with handicapping conditions should have the opportunity to live and function as independently as they are able. Such philosophy and goal, in turn, provide direction for the type of housing to be developed, the services and assistance provided, and the manner in which the housing environment is to be managed.

2- Correspondingly, it was considered important that the housing and living environment treat the disabled person in a manner similar to the treatment extended to the rest of the population so that the disabled person can be integrated into "normal" community and residential living.

3- There were strong sentiments against institutional settings for handicapped people, and concern was expressed about the nature of potential residential housing arrangements. For instance, the optimum size of a housing arrangement would be small enough to provide a realistic, homelike setting. The two types of housing predominantly recommended were individual or shared living within a single, independent housing unit in scattered residential sites or within a small group home in a residential neighborhood.

4- Economic factors, related to economies of scale, were also considered and it was determined that the above philosophical considerations could be accommodated feasibly and economically. One example would be the development of a number of small, and perhaps varied, housing arrangements under one sponsorship.



There were other observations from the national institute that may be useful for a group contemplating sponsoring a training institute to consider:

- There was a consensus that the process approach to the training was a practical and positive one for acquiring an understanding of how to plan and develop housing and for assisting others with this task. At the same time, the participants expressed the need for specific, technical housing information, particularly in the area of financing the housing and services. Potential training sponsors should be aware of this need and may wish to consider holding sessions, in addition to the structured training sessions, around areas of special interest, such as finance. The manual further discusses how these sessions can be organized and how they can be incorporated into the training program without violating the intent of the training.

- The desire was also expressed for the participants to have time together informally to become better acquainted and to exchange work experiences. Such opportunities can be arranged within the program structure.

- The mix of participants attending the national institute was considered a positive factor in the training experience. The joint participation from housing and service experts added to the quality of the training and contributed to the information gained by the participants. It also reinforced the importance of the housing and service spectrums working together in the effort of furthering the availability of suitable housing opportunities for handicapped persons.



## I. PURPOSE OF TRAINING

- 1 The purpose of the training effort is to develop a cadre of persons throughout the country to be knowledgeable in training and assisting others in how to create a variety of housing arrangements for handicapped persons.
- 2 The intended results of the training are to:
  - Make available to interested groups assistance and guidance with the task of developing housing for the handicapped; and
  - Increase the opportunities for handicapped persons to participate as independently as possible in community and residential living in appropriately designed and serviced housing.
- 3 The training is directed to individuals at the national, regional, state, and local levels who will serve as the trainers for the training programs at the respective levels of training, and to interested groups who are considering sponsoring residential housing environments for handicapped persons within their localities and who desire assistance with this task.
- 4 The basis for the development of the training is the housing guide, which provides the resource information needed by groups to develop housing. The training program uses the guide material as the text and illustrates how the guide information can be used by trainers and interested groups in achieving housing for the handicapped.
- 5 The fulfillment of the training and its purpose are to be achieved through:
  - The implementation of a training plan that outlines a scheme for providing the training throughout the country (paragraphs 8-13); and
  - The use of a fully developed training program that sets forth the content and format for the training (paragraphs 48-257).



## II. TRAINING FOCUS AND TECHNIQUE

- 6 The training focusses on process -- the process of planning for the development of housing for the handicapped and the process of training others to become trainers. The training is not intended to provide all of the specific, technical information that may be needed to develop housing.
- 7 Process can be defined as an orderly method for accomplishing something that requires continuing development through a series of steps.
- 8 The development process for achieving housing for the handicapped provides a method for systematically planning for the development of the housing. It: (1) delineates the tasks and actions that need to be completed to achieve the housing; (2) provides a sequential ordering of when the tasks should be undertaken; and (3) provides the procedures and guidance for accomplishing the tasks.
- 9 By focussing on the practical process of housing development, it is hoped the training will enable groups to more readily achieve housing for the handicapped.

### Technique

- 10 A case situation simulating the development of housing for the handicapped is the technique that has been designed to carry out the training.
- 11 This technique requires the training participants to work in small groups according to their interest in a particular category of handicapping disability, such as moderately physically disabled, the more seriously developmentally physically disabled, the mentally retarded, or the mentally and physically disabled.
- 12 Each group is given a defined case situation that describes a particular community and is asked to assume the role of a group within the community that is considering sponsoring housing for a segment of the handicapped population. The group has the task of developing an appropriate housing plan for its population group and community situation.



- 13 The training program and materials are directed to assisting the group with the task of preparing its housing plan. When the task has been completed, the group will have experienced the process a community group would go through in planning a housing arrangement for the handicapped and hopefully will have a better understanding of how to develop the housing and of how to instruct others in this process.



### III. USE OF THE MANUAL

- 14 This section illustrates how the training manual can be used and discusses some of the considerations in conducting the training program.
- 15 As stated, the manual has been designed for a very specific training use by organizations who wish to sponsor a training program on housing the handicapped and by the trainers and recorders of these programs.
- 16 It is intended that the manual be used as a working tool in planning and conducting a training program and in instructing the training staff in their duties and responsibilities. The following is a section-by-section description of how the manual can be used.
- 17 The preface and sections I - II provide background information on the philosophy and intent of the training and the plan for carrying it out. This information is included for use by sponsoring groups and their training staffs as background and preparation for the training. It is also included for use by trainers in presenting background information to the participants in the small group sessions.
- 18 It is anticipated that this section of the manual, section III, will be frequently referred to and used by the training staff as they prepare for and conduct the training program. It is hoped these guidelines will enable the training to be provided in an effective manner.
- 19 Section IV, "The Training Program," constitutes the major portion of the manual. It details the complete program for providing the training and is designed specifically for the trainer's use. The program provides a description of each training session. It sets forth the work to be completed during the session, provides the information needed to complete it, cites the pertinent pages in the guide as resource materials, and suggests to the trainer and recorder how they should provide and record the training.
- 20 The training program is detailed and is presented in explicit narrative form to



enable those persons with minimal training experience to conduct the training without having to design the program themselves. For these persons, the step-by-step instructions and detailed information will be an invaluable aid and undoubtedly should be followed closely.

- 21 Persons who have considerable training experience will want to use the training program in a different manner. They will not need the extent of information and instructions contained in the program to effectively carry out the training. It is suggested these persons use the program description as a guide in providing the training.
- 22 The intent of the training and the activities proposed for each session should be carried out as prescribed in the program. However, the skilled trainer will not need to follow the program description as closely and may want to make some variations in the presentation of information. For these persons, it is suggested they read through the description for each session and select from it the information needed to provide the training.
- 23 The fifth section of the manual contains an index of the materials used in the training. Each item is identified and described, its use explained, and the session in which it is to be distributed and used identified.
- 24 The trainer will need to arrange for the duplication of the number of copies needed of each item, group the duplicated materials according to the session in which they will be used, and distribute them to the participants at the appropriate time.
- 25 Section VI contains the forms the recorders will need to record and report the housing plan developed by each group, and includes instructions for preparing them. This section was designed for use by the recorder to understand the kind and extent of information to be recorded, and to guide the recording of the information in the format required.
- 26 Suggestions for providing the training to other trainees are discussed



in the final section of the manual. This information can be used by groups who are interested in sponsoring a training program on housing handicapped persons within their region as an aid in arranging for and providing the training. The information in this section should be used in conjunction with the training materials in session VI of the program.

- 27 Throughout the manual, a styling technique is used to enhance the usability of the manual. This technique numbers the paragraphs, which enables information previously discussed to be easily referred to and eliminates the need to restate information.
- 28 For instance, if a trainer needs to provide an explanation of the training plan during a session, he/she can quickly refer to the section in the manual where this information is provided by following the citation of the relevant paragraph numbers. Also, if an aspect of the housing development process discussed earlier in the program needs to be referred to, the information does not have to be restated if the pertinent paragraphs are cited and hence can be easily referred to. This technique enables the training information to be presented and used in an efficient way and is a valuable aid for the trainer.

#### Conducting the Training Program

- 29 The training program should be conducted according to the directions given in the program description in section IV. Some additional considerations in carrying out the training are discussed below, such as the personnel needed to implement the training, general guidelines to follow in conducting the program, and additional activities a sponsor may wish to consider.

#### Personnel

- 30 The personnel needed to conduct the training program include:
  - A chairperson or convener of the training institute;
  - A trainer and a recorder for each small work group;



- Resource person(s) knowledgeable about housing for the disabled; and
- A panel to discuss financing.

Other persons, such as speakers at the opening session or at special evening meetings, may also be included.

- 31 It is crucial that the personnel be carefully selected and that they possess the skills necessary for their training roles. Of particular importance to the success of the training are the trainers. These persons must have previous training experience and skills.
- 32 The functions of the training staff are briefly described in the following paragraphs.
- 33 The chairperson for the training institute will preside over the opening and closing plenary sessions and provide the introduction to the training. (If the chairperson cannot stay for the entire institute, the housing resource person could conduct the final plenary session.) The person selected for this role should have stature within either the housing or handicapped field and have the ability to set the tone for the important work to be done in the training.
- 34 A trainer should be assigned to each group of participants to preside over the small group work sessions. His/her primary function will be to assist the group with the task of preparing the plan for housing development by: explaining the task to the group; guiding the group through the task; supplying needed materials; directing group discussion; posing questions; summarizing important points; and evaluating the group's efforts.
- 35 For each work session, the trainer will:
  - 1- Review with the group the work that is to be undertaken during that session;
  - 2- Refer the group to the relevant guide information and the appropriate steps in the development process;



3- Allow time for group work activity; and

4- Assist the group with the collective efforts in formulating the plan information.

It is not the purpose of the trainer to lecture on technical housing information. He/she should serve as a guide for the small group work activity.

- 36 As stated, the persons selected for this function should have previous training experience and have an interest in or experience with housing or handicapped persons.
- 37 One person from each work group should be asked to serve as the recorder for the group to record the deliberations of the group's collectively drafting information for the plan and to record the completed work on the plan recording form. The recorder will also need to assist the trainer in identifying missing information and to record questions posed by the group.
- 38 The persons asked to serve as recorders should have the ability to listen carefully, summarize information, write succinctly, and record clearly on the blackboard. They should also be agreeable and interested in undertaking this task which will require extra time and effort in addition to participating as a trainee.
- 39 It is also suggested that an additional staff person be available to the groups to serve as a resource person. The individual selected for this role should be knowledgeable in the field of housing and housing development for the disabled. He/she will rotate among the small groups to answer technical questions or supply needed housing information. The recorder will note the questions raised by the group and pose them to the expert when he/she comes to the group. This resource person is not to lecture or lead discussion.
- 40 The housing resource person is also given the responsibility of serving as chairperson for the panel discussion on financing housing and services. In this capacity



the resource person will need to outline for each panelist the subject matter he/she is to cover; provide an overview of the financing considerations as discussed in chapter III of the guide; and introduce and chair the panel discussion.

- 41 To carry out both functions, the housing expert will need to be very familiar with the housing guide and be able to answer questions about its content.
- 42 The persons chosen to serve on the finance panel should be experts either in the areas of housing or service financing. It is suggested two panelists address the subject of housing finance and one speak on how the needed services can be provided. Because of the questions the participants will undoubtedly ask about obtaining financing under the Department of Housing and Urban Development (HUD) programs, it would be wise to include a representative from HUD on the panel, who can address this subject with authority.

#### 43 Guidelines

1- The training personnel should be selected in time for them to prepare adequately for their participation in the training.

2- The trainers and recorders will need to be familiar with the housing guide and manual. Both documents must be sent to the trainers and recorders in advance of the training to allow sufficient time for studying.

3- The trainers should meet prior to the institute to receive training in their role as trainer and to carefully review the training program. The designated lead trainer will have responsibility for this meeting. This preparation session should be at least six hours, and if possible should be held one week prior to the training institute. Such scheduling will allow the trainers time to prepare for conducting the training.

4- The recorders should also meet prior to the institute to receive a briefing on their duties and responsibilities. One of the recorders should be



asked to serve as the principal recorder to coordinate the work of the recorders and to work closely with the lead trainer.

5- Each evening of the training period, the trainers and recorders should review the program for the next day and prepare for the work to be carried out, including organization of training materials.

6- The trainer should conduct each session as outlined in the training program, and the recorder should complete the work as required.

7- The trainer may need to remind the participants that they should view the training from the standpoint of how to convey to others basic information about the housing development process. For instance, some of the information in the training may be familiar to the participants. However, when they assume the role of teaching or assisting others with the task of housing development, those persons may not be familiar with the process and will need to receive the necessary guidance.

8- The trainer will need to be cognizant of time and guide the training according to the training schedule. This may require the trainer to call a halt to group discussion.

9- The trainer will also need to keep in mind that his/her role is that of a guide and not a lecturer. This role will require diplomacy and skill on the part of the trainer.

10- The technique of posing questions is a useful one and should be used by the trainer. This technique helps to clarify thinking, redirect efforts, and stimulate answers and discussion.

11- In the same regard, the trainer should be sensitive to the moods and reactions of the group and respond to them accordingly.

12- The trainer may also need to make adjustments or changes in the program if the situation requires.



13- The recorder will need to listen carefully to the deliberations of the group and to record the information accurately and concisely.

14- The recorder may also need to assist the trainer by keeping track of the discussion and identifying missing information.

#### Additional Special Interest Activities

- 44 The training sponsors may wish to include evening sessions in addition to those sessions outlined in the training program. These sessions could accommodate special activities that the sponsor feels would add to the training experience.
- 45 For example, an opportunity for the training participants to meet informally in the evening to exchange work experiences and to become better acquainted with one another may be desirable. Also, an evening meeting directed to answering the specific, technical housing questions that will arise during the training might be useful to accommodate the participants' need for technical information that cannot be provided in the training program. Such a meeting could be chaired by the housing resource person and any interested participant could be invited to attend.
- 46 The kind of special sessions, if any, the sponsor includes in the training institute will depend on the interests and background of the participants and thus may vary with different training groups.
- 47 It will be important for the sponsors to keep in mind that the purpose of these special interest sessions is different from the training program sessions and that they should not detract from or hinder the intent of the training.



## V. THE TRAINING PROGRAM

- 48 The material in this section of the manual comprises the program for training interested persons in how to plan for the development of housing for the handicapped, and in how to train others in this task.
- 49 The program has been developed as a prototype for use at all levels of training in the training -- national, regional/state, and local. It has been designed so that it can be easily replicated by other trainers. It contains the essential information, materials, and instructions a trainer would need to provide the training, and presents the information in an explicit narrative form. It is hoped this design will enable successive sponsoring groups and trainers to provide the training with a minimum of preparation.
- 50 The training program is designed for a five-day period and contains 12 individual sessions. Most of the training should be provided in a small group setting of approximately 10-15 persons. Four plenary sessions and one field trip are suggested. The personnel needed to provide the training, and their functions, are outlined in paragraphs 30-42, and the instructions for conducting the training program are contained throughout the program description and in paragraph 43.
- 51 The content of the training program is organized around the 12 sessions as follows:
- Session I. Introduction to the training
  - Session II. Organizing for small group work activity
  - Session III. Reviewing the case situation
  - Session IV. Defining the proposed housing
  - Session V. Investigating resources for financing housing and services
  - Session VI. Training others
  - Session VII. Describing the housing to be developed



Session VIII. Field trip

Session IX. Securing funding and support for the housing

Session X. Implementing the housing plan

Session XI. Reviewing the housing plans

Session XII. Reporting the plans

52 For each session, the program provides:

- A statement of the purpose of the session;
- An explanation of the work to be undertaken during the session;
- Suggestions for the trainers and recorders on how to conduct and record the training for that session;
- The information, assignments, and instructions the trainer needs to give;
- References to the pertinent guide information and steps in the development process that the trainees will need to consider;
- A listing of the training materials to be distributed during the session and an explanation of their use;
- A description of the group's work activity, and content of the activity as a model for the trainer's use in guiding and evaluating the group's work; and
- Concise statements of critical information that should be emphasized by the trainer as important points.

53 Also, for each small group session a face sheet is provided. This sheet summarizes the content of the session and is included as a reference tool for the trainer to quickly determine the materials to be distributed during the session, the guide pages cited, the subject matter to be covered and how the session should be conducted.

54 The basic design and format of the program is the same as for the other sections of the manual. Additional features of the



program include the use of subheadings, underlining of important material, and listing of information. Personal pronouns are also used in various sections of the program description in the explanations of information that are included for the trainer's use. These features are used for easy presentation of, and quick reference to, the training material.



## PROGRAM

### First Day

9:00-10:00 Registration

10:00-11:00 Session I. Introduction to the Training

- 55 The purpose of this session is to convene the training institute, describe the purpose of the training, and explain how it will be provided.
- 56 The introduction should be given to the full participant groups in a plenary session by the chairperson of the training institute. The session should begin by officially convening the training institute, welcoming the participants, and making the necessary introductions.
- 57 Next, the chairperson will want to explain to the participants:
- 1- Why the training has been developed;
  - 2- The plan for implementing the training;
  - 3- The program for the training and how it will be provided;
  - 4- Their role and task; and
  - 5- Any logistic or housekeeping matters.
- 58 The following is an example of an explanation the chairperson may give to introduce the training. He/she will undoubtedly want to add other remarks appropriate to the particular training group.

### Explanation

#### Why training?

- 59 The training you are about to participate in came about because of the recognition of two growing needs:
- 1- The need to make available suitable, non-institutional living arrangements, in community and residential settings, for persons with handicapping conditions; and
  - 2- The need to provide assistance to community groups that are interested in making available such housing.



- 60 As many of you are aware, the task of developing housing is a complex one that requires considerable knowledge and experience. Although many groups are interested in sponsoring the development of suitable housing for disabled persons, they are often unfamiliar with how to go about planning and developing it.
- 61 To help meet these needs, this training effort is being sponsored.
- 62 The first part of the effort was the development of a resource book to be used by interested groups in designing, managing, and servicing housing for handicapped persons. This book, Housing for the Handicapped and Disabled: A Guide for Local Action, was prepared by Marie McGuire Thompson of the International Center for Social Gerontology for the National Association of Housing and Redevelopment Officials.
- 63 In addition to the resource book it was also considered necessary to have a cadre of trained persons throughout the country who, through the use of the guide, could assist groups in the community with the task of developing housing for the handicapped.
- 64 It is to this purpose that the training institute we are participating in is directed.
- 65 To accomplish this goal a plan was developed to establish a nationwide network of trainers or persons knowledgeable about the housing development process. Initially, 45 people from throughout the country received training in the process of how to develop housing for the handicapped and in how to train others in the process. These people were asked to hold workshops in their regions or states to train an additional cadre of persons who in turn would train others to work directly with community groups interested in developing housing for the handicapped.



- 66 This training scheme was set in motion by the national training institute held in May 1977. The purpose of that institute was to train the first level of trainers and resource people.
- 67 The focus of the training is on process -- the process of planning for the development of housing for the handicapped and the process of training others to become trainers. The training is not intended to provide all of the specific, technical information that may be needed to develop housing.
- 68 Process can be defined as an orderly method for accomplishing something that requires continuing development through a series of steps.
- 69 A five-day training program has been designed to implement the training. This program is essentially the same for each group of trainees. It requires the participants to work in small groups according to their interest in a particular category of handicapping disability.

#### Participants' role and task

- 70 Each group will be asked to function within a defined case situation and will have the task of developing an appropriate housing plan for that situation.
- 71 This task will be carried out in 12 training sessions, each of which is directed to completing a segment of the housing plan. In preparing the plan, you will make use of the housing development process, the guide, and other training materials. When each group completes its work, it will have outlined the procedure and information that is required in developing a housing plan and will have gained experience in using the development process and in how to train others in this process.

#### Conclusion

- 72 Your task and how you will go about carrying it out will be explained in greater detail in the next session, session II, by the group leader.



- 73 In concluding this introduction to the training, we hope you find the next five days of training to be practical and useful to you.
- 74 You will find in your registration materials a card that identifies your work group and the room in which your group will meet. These assignments are as follows:

You may now adjourn to your designated room.



FACE SHEET FOR SESSION II  
FOR THE  
TRAINER'S USE

First Day  
11:00-12:30

Session II. Organizing for Small Group Work  
Activity

Purpose - Prepare for training task

Subject Matter - Functioning of the small group sessions  
- Review of the training task  
- Review of the beginning activities in developing housing

Conduct of Session - An introductory, explanatory meeting with the trainer presenting background information on the above subject matter

The group activity includes:

- 1- Reading the guide references (bottom of pages 4-5) and identifying the important points in this material;
- 2- Completing an exercise of outlining the steps in assessing housing need and demand; and
- 3- Identifying the consideration in selecting the target population.

Materials to be Distributed - Item 1

Guide Pages Cited - 102, chart 1; xv; 1-2; 4-5; 11; 14; exhibit 1; 35-39; exhibit 4-5; 13



GUIDE  
REFERENCES

11:00-12:30 Session II. Organizing for Small Group Work Activity

- 75 The purpose of this session is to acquaint group members with one another and to prepare for carrying out the assigned training tasks.
- 76 The trainer should convene the session by:
- Identifying the focus of the group (i.e., developing a housing plan for the moderately physically disabled);
  - Introducing him- or herself and the other staff person for the group, the recorder; and
  - Asking each member of the group to identify him- or herself and the organization they represent.
- 77 Next, it is suggested the trainer:
- 1- Explain the purpose of the session, stated in paragraph 75 above;
  - 2- Identify the information to be discussed during the session:
    - Functioning of the small group sessions;
    - Review of the training task;
    - Review of the beginning activities in achieving housing; and
  - 3- Explain how the session will be conducted.

This session will be devoted to providing the background information needed to participate in the training program. Thus, it will be one small group session in which the trainer will spend the major portion of the time providing information in an explanatory manner.



## Explanation of Background Information

### Functioning of the Small Group Sessions

- 78 We will be working together in seven small group sessions during the five-day training period. Since the focus of the training is on your active participation, the small group sessions will be conducted as informal working meetings devoted to carrying out the task of housing development.
- 79 Each group has available some staff resources to assist with this task. They include a trainer, recorder, and housing resource person.

#### Trainer

- 80 The trainer has the function of guiding the work of the group, facilitating discussion, and supplying needed training materials.

#### Recorder

- 81 The recorder has the responsibility of assisting the trainer, recording the deliberations of the group, and completing the plan recording form.

#### Housing resource person

- 82 An additional staff resource available to the group is a housing expert, an individual knowledgeable in the field of housing, who can answer technical questions or supply needed housing information. This person will rotate among the small groups to supply information as needed.

### Review of the Training Task

- 83 As briefly explained in session I, we are being asked to undertake the task of developing a housing plan for disabled people within a particular community situation.
- 84 The description of our community situation will be provided at the beginning of the next session. First, however, we will need to understand what is required in preparing a housing plan.



### Developing the plan

- 85 Trainer, at this point you will want to hand out item 1 to the group, "Outline of Plan for Developing Housing for Handicapped Persons."
- 86 This sheet identifies the content and major elements of a housing plan. You should read through this outline with the group and explain that the outline provides the basis for the plan each group will develop and guides the work effort. For example, eight major plan elements are listed. Under each element, the kind of information that needs to be developed by the group is defined. During the training you will be asked to supply this information and have it recorded on the designated plan recording form by the recorder.
- 87 You are only being asked to supply the needed information in outline form. The limited time and information available will not permit the plan information to be presented in fully developed form. Thus, when you have completed your task, the product will be an outline of a housing plan.
- 88 Each training session will be directed to completing a section of the plan. Thus, at the end of the training program, the housing plan will be completed.

### The housing development process

- 89 As explained in the first session, the training program focusses on providing the participants with an understanding of the housing development process.
- 90 The task of preparing a housing plan will require you to go through the process of housing development. In order to complete a section of the plan, certain tasks in the development process will need to be carried out. Thus, when the plan has been completed, you will have experienced the full development process.
- 91 Since an understanding of how to use the development process is so essential in realizing housing for disabled persons, I would like to take a few minutes to review this process with you.



Chart 1

- 92 Trainer, it is suggested that you use item 2, "Information Sheet on the Housing Development Process," as the basis for your explanation. In fact, it would be appropriate for you to read the information on this sheet to the group. At the point of discussing the tasks in the process (bottom of page), you may wish to ask the group to refer to chart 1 in the guide.
- 93 At the completion of this explanation, you may wish to point out to participants that they will refer to and use the process throughout their work activity. It will also be important for the trainer to review with the group the tasks in the process as they complete them during training.

#### Review of the Beginning Development Activities

- 94 Because of the limited time for the training it will not be possible to work through each task in the housing development process. Nor is it necessary to carry out every task to acquire an understanding of how to use the process. Some of the initial organizing and planning activities, such as tasks 1, 2, and 3 of the development process, can be summarized.
- 95 However, it will be important to understand these beginning development activities to guide the sponsoring community groups through these tasks. Thus, I would like to review some of these beginning activities with you briefly.

#### Defining the concept

- 96 The first step for any group considering development of housing for the handicapped is to define the concept of the housing they wish to develop -- its dimensions, characteristics, goals, and purpose.
- 97 Every group begins with some idea of what the housing should be like, and as it proceeds with the planning its concept of the housing will become more defined.

1-2

4

11

14

Exhibit 1



- 98 Initially, however, every sponsoring group should carefully consider the characteristics of the housing to be developed and should formulate the goals and objectives the housing is to achieve. These activities are important as they provide a common framework for the work effort and guide the development of the housing.
- 99 The guide discusses some of the essential characteristics of housing for the handicapped. It would be useful for sponsoring groups to consider these characteristics in defining their housing. The trainer should read through this information with the group.
- 100 The trainer may wish to point out that it is through this activity that the important philosophical considerations in providing housing opportunities for disabled persons are discussed.

#### Organizing for housing development

- 101 Another important beginning activity is for the sponsoring group to organize for its task properly.

- 102 The guide presents some useful suggestions in forming a sponsoring organization that should be considered by newly organized groups. The trainer may wish to ask the group to identify some of the important points raised by the material, such as:

- There are advantages in the sponsoring group becoming a non-profit entity (i.e., to participate in certain government housing programs, to assume tax-exempt status, and to attract community resources;
- The persons selected for membership should be competent and be able to contribute to the development of the housing;
- The organization should be representative of the interested community groups and should have the capacity for continued existence and attraction of resources and support; and



- No member of the sponsoring group should have potential for personal gain from the housing plan adopted.

Assessing the housing market

35-39

103 A third preliminary activity a sponsoring group needs to undertake is determination of the market for such housing.

104 The trainer may want to begin the discussion of this activity by indicating the importance of assessing the housing market in adequately planning for the housing. This process:

1- Documents the need and demand for the housing;

2- Provides the basis for selecting the particular segment of the handicapped population to be developed; and

3- Provides support for securing financing for the housing.

105 It is important to point out that the type of the assessment will vary according to the extent of documentation needed. For some situations, an in-depth, professional market assessment may be required. For others, informal determinations of need may be sufficient.

35-39

106 The essential information to consider in organizing for this task is presented in chapter 4 of the guide. It is suggested the trainer have the group re-read the chapter and, using this information, consider the steps involved in carrying out the task of assessing the housing market.

107 The trainer should allow the participants 15 to 20 minutes to read the material and to think through the sequence of activities that need to be undertaken in determining the need and demand for housing. The trainer should then reconvene the group and ask it to outline these activities, beginning with the first step. The recorder should record the information identified by the group on a blackboard. As the steps are detailed, the trainer should ask the group to cite the major considerations under each step. The trainer may need to supply important information not identified by the group or to pose directive questions.



- 108 The following is a sample of the information that should be identified by the group. It can be used by the trainer to guide and evaluate the group's efforts.

Sample outline of steps in assessing  
housing need and demand

- 109 Step 1. Determine extent of documentation needed.

The decision as to whether the need and demand for the proposed housing should be documented and if so, to what extent, will depend on the following considerations:

- Extent of housing for the handicapped already available;
- Extent of existing knowledge and documentation about the need and demand for the housing;
- Projected size and scope of the housing;
- Requirements of potential funding sources;
- Resources available to the group; and
- Extent of information needed to promote community support.

If the decision is made to carry out some documentation of need, the group should proceed to step 2.

35-36

- 110 Step 2. Determine whether to enlist the services of a professional to conduct the assessment or to carry out the assessment internally.

Reaching this determination will depend on such considerations as:

- Size of the proposed housing and the specific requirements set by the potential funding source;
- Cost of a professional assessment and the resources available to the group to pay for outside assessment;
- Capability of the group to conduct the assessment itself; and



- Extent of existing knowledge and documentation.

The use of seed money, college students, service agency personnel, and funding agency personnel should also be considered.

37

- 111 Step 3. Identify the information that should be collected to document need adequately.

The extent of information gathered and analyzed will depend on the considerations listed and the decision made in step 1. There are, however, minimum categories of information that should be collected if an assessment is conducted. These are:

- Number and location of the total universe of handicapped persons in the area being considered;
- Category of disability and functional capacity of each;
- Age, sex, and marital status;
- Income and its source(s);
- Educational and occupational status;
- Current living situation, i.e., family home, nursing homes, shared dwellings, etc.;
- Type of housing conditions; and
- Other information as required by potential funding source.

- 112 Step 4. Gathering the information.

#### Method

There are primarily two methods by which the needed information can be obtained:

- By consulting available data, which will identify the number, functional capacity, and general population characteristics of the handicapped in the area, and

Exhibits 4 and 5

- By conducting special surveys, which identifies interested eligible persons, their housing preferences, their service



requirements, and their potential to relocate in the proposed housing.

The method of data collection used will depend on such considerations as:

- Extent and kind of information needed;
- Resources available to collect data; and
- Stage of development of the housing.

113 For many situations both methods will be used. For instance, in initially seeking support for the proposed housing, it may be sufficient to consult existing data sources. However, once general approval is granted, it may be necessary to meet more specific documentation requirements. In that case, special surveys may be necessary.

#### Sources

114 There are a number of sources, at the local, state, and national levels, that can provide data useful in determining need. The trainer may ask the group to identify some of these sources.

115 The decision as to which source(s) to use will depend primarily on the sources available to the group and on the information the sources can provide. In most cases a variety of sources will probably be consulted.

116 Step 5. Determine the demand for the housing.

The above information documents the need for the housing. The group next needs to determine the actual demand for the housing:

- The number of persons who are in need of the housing and who would move in if it were available.

117 This determination will require more in-depth information from the potential client group. Special surveys are the most effective method for determining demand. Personal contacts and information from handicapped organizations also can identify potential occupants.



- 118 The important point to emphasize here is the necessity for determining the actual demand for the proposed housing and not just the theoretical need for it.
- 119 The above exercise is designed to provide the group with an understanding of the sequence of activities, decisions, and considerations involved in assessing the local housing market. At the end of the exercise, the recorder should take the information identified by the group and record it under section II on the plan report form.

11-14

#### Selecting the client group

- 120 Once the assessment has been completed, the next step for a group is to determine what segment of the handicapped population the housing will be directed to. This determination is an important one as it largely dictates the type of housing to be developed and the type of services and environment to provide.
- 121 There are a number of considerations that will assist a group in selecting the client group. The trainer may wish to ask the group to identify these considerations while the recorder lists them on the plan recording form under section III.

#### Considerations include:

- Results of the local housing market assessment regarding the need and demand for housing;
- Experience of the sponsoring group in developing specially designed housing and in working with handicapped persons and the capacity to develop a housing project;
- Contemplated size of the proposed housing; and
- Extent and kind of potential financial support.

13-14

- 122 The important point for the trainer to emphasize is: it is wiser for the unexperienced housing organization to plan housing for the mildly to moderately



handicapped than for the severely handicapped, which requires more skill, experience, and money to develop.

- 123 This discussion completes the review of the beginning activities of housing development, and concludes session II.
- 124 In adjourning the session, the trainer should ask the participants:
  - 1- To keep in mind the background information presented in this session as they proceed with their work activity and
  - 2- To reconvene at 2:00 in the afternoon in the same room for a discussion of the case situation.



FACE SHEET FOR SESSION III  
FOR THE  
TRAINER'S USE

First Day  
2:00-4:00

Session III. Reviewing the Case Situation

Purpose - Become familiar with the case situation

Subject Matter - Study of the case situation

Conduct of Session - The session is devoted to a review and discussion of the community situation the group will be planning the housing for. The only group activity will be studying the case description and selecting critical information from it.

Materials to be Distributed - Item 5

Item 6  
(to be used  
by trainer)

Guide Pages Cited - None during the session. Guide material suggested for review on the first evening includes:  
pages 14,56; 11-21; 49-53; 4,  
70-74; 41-47; 6, 35-36.



2:00-4:00 Session III. Reviewing the Case Situation

- 125 The purpose of this session is to become familiar with the community situation for which the housing will be planned.
- 126 The trainer may wish to begin the session by:
- 1- Explaining the purpose of the session, stated in paragraph 125 above and
  - 2- Explaining that each group is given a defined community situation to deal with in developing their housing plan and that this situation provides the context for carrying out the training task.
- 127 Next, the trainer will want to distribute the written description of the case situation, item 5, to each group member. The trainer should carefully read through the description with the group, as it is important for the group to recognize and understand the information presented in the case.
- 128 Following the reading of the case situation, the trainer will want to point out:
- The case description does not provide all of the information one would find within a community, but it does contain the essential information needed for planning for the housing and
  - The case description shows the beginning activities in the development process, tasks 1, 2, and 3, as having been completed. It also includes certain facts as "givens," such as the population to be served and the size and type of housing to be developed.
- 129 Such information is included in the case situation as there is not time for the group to go through each step in the development process, or to develop all the information for the plan. The trainer will probably need to emphasize throughout the training that the information given in the case description is just one



example of the kind of information a sponsoring group may develop, and for purposes of simulating the development of housing it is necessary to proceed from a certain fact basis. The important consideration is the process one goes through in reaching a decision, and not the decision itself.

- 130 The participants are being asked then to accept the fact situation of the case and to proceed from these facts to plan for the housing needed. Experience with conducting the training program has shown that type of housing is one area about which participants may have strong feelings; this may require modification of the type of housing proposed in the case situation.
- 131 Since the participants will be constantly using the information in the case description, it will be useful for the group to discuss critical information in the case. One approach would be for the trainer to ask the group to select from the description information on:
- Population to be served;
  - Type of housing to be developed;
  - Assessment of need and demand for housing;
  - Resources available for the housing; and
  - Constraints hindering development.
- 132 The trainer can begin by providing the information on community size and characteristics. The recorder should write down this information and the information identified by the group on newsprint, which can be tacked to the walls for quick reference of important case information to consider in developing the plan. The trainer can make use of the summary of the case description, item 6, in guiding the group through this exercise.
- 133 The group should be asked to keep this case situation information in mind as it works through the development of the plan.



- 134 If time permits, the trainer can review the proposed goal and objective for the group's housing. This information, which is provided for the trainer on the plan recording form, should be written out on newsprint by the recorder prior to the session. The trainer should read the goal and objective statements to the group and point out their usefulness in guiding the development of the housing. A great deal of time should not be spent on debating the merits of the statements, but it may be useful to have some group discussion on the philosophical considerations in developing the housing.
- 135 In concluding the session, the trainer can indicate that the second morning session, session IV, will be devoted to defining the housing for the community situation. This will entail consideration of some early decisions in planning the housing, such as the size and location of the housing, type of services or assistance needed, use of existing or new facilities, and use of professional assistance.
- 136 There is some information in the guide that will be useful for the participants to review in preparation for the session IV work activity. This information is contained on pages 14, 56; 11-21; 49-53; 4, 70-74; 41-47; 6, 35-36.
- 137 The session should be adjourned between 4:00 and 4:30.



FACE SHEET FOR SESSION IV

FOR THE

TRAINER'S USE

Second Day  
9:00-12:00

Session IV. Defining the Proposed Housing

Purpose - Consider early decisions in planning for housing

Subject Matter - Size, location, and type of housing  
- Type of services  
- Use of existing or new facilities  
- Use of professional assistance

Conduct of Session - The session is devoted to a group discussion of the initial decisions in planning the housing. The trainer will lead the discussion and guide the group's work.

The group activity includes:

- 1- Considering each decision and discussing the major considerations in making the decision and
- 2- Coming to a conclusion regarding the decision for their case situation.

Materials to be Distributed - None

Guide Pages Cited - 56; 11-21; 49-51; 4; 70-74;  
41-44.



## Second Day

### 9:00-12:00 Session IV. Defining the Proposed Housing

138 The purpose of this session is to consider some of the early decisions a sponsoring group needs to make in planning and developing housing.

139 These decisions relate to:

- Size, location, and type of housing to be developed;
- Type of services to be provided;
- Whether to use existing facilities or to build new housing; and
- Whether to enlist professional services to assist with the planning.

140 The decisions made on these considerations help to define the dimensions of the housing and provide a basic housing description which is needed in seeking seed money for planning, in approaching developers and other sources for financial support, and in further developing the housing plan.

141 The activities to be carried out by the trainer in this session include:

- 1- Explaining the purpose of the session and the importance of these early decisions (paragraphs 138-140) and
- 2- Explaining how the session will be conducted.

This session is devoted to discussing these initial housing decisions. The trainer will guide the group through the decisions and, considering each decision individually, will ask the group to discuss the major considerations in making the decision and to come to a conclusion regarding the decision for the case situation. The participants should make use of the information in the guide in providing this requested information. The recorder will record the information on newsprint as it is provided by the group and will transfer the information to section IV of the plan recording form at the end of the session.



- Lead the discussion of these initial housing decisions using the format and information presented below.

### Discussion of Housing Decisions

#### Size

142 The case description specifies the size of housing for the case situation. The trainer should restate the size of housing proposed for the situation and should ask the group to identify some of the factors that determine the size of housing to be developed. Some of these considerations are:

- Extent of need and demand for the housing;
- Optimum size of the housing for the client group; and
- Experience and resources of the sponsoring group.

143 An important point to make is that the housing should congregate no more handicapped persons than can be absorbed into the neighborhood community.

#### Type of housing

144 The type of housing to be developed for the client group in the case situation should be reviewed. The trainer should ask the group to discuss some of the characteristics of this type of housing arrangement, so there is a common understanding of the nature of the housing.

145 If time permits, the trainer may also ask the group to identify some of the other types of housing that are appropriate for handicapped persons and to discuss the factors that determine the type of housing to provide.

#### Location

146 The location of the housing is an important determinant of its success in providing normalized residential and community living for its residents.



147 Some of the factors the group should consider in determining the location for the housing facility are listed below. The trainer should ask the group to identify these considerations.

- Does the location provide opportunities for involvement in a normal, residential neighborhood setting?

- Does the neighborhood contain the facilities needed by the resident population, or does it have accessible transportation to the needed facilities?

- Is the land and/or structure available at an affordable price?

- Does the potential site(s) have the necessary physical characteristics such as appropriate topography, lot size, soil and drainage conditions, views, plantings, and available utilities?

- Is the potential site(s) zoned properly for the type of housing being planned?

- What is the neighborhood attitude toward the proposed housing?

148 The trainer should then lead a discussion of these considerations in relation to the defined case situation. At the conclusion of the discussion, the group should be asked to make the best decision it can with the information available to them, as to the general location of the housing it is planning. The recorder should record the considerations discussed and the decision reached; the group should then consider the next decision.

#### Type of services

149 In discussing the services of personal assistance that may be needed in the housing, it is suggested the trainer lead a discussion around the following questions:

- Why are services a critical part of any housing program for handicapped persons?



- What determines the kind and extent of services to be provided?

- What is one of the most difficult problems in providing for the needed services?

- 150 Following the discussion of these questions, the trainer should ask the group to identify the type of services or assistance the potential housing residents may need. The recorder should record the services on newprint as they are identified.

#### Use of new or existing housing

41-44

- 151 The decision of whether to build new housing or to rent, lease, or purchase an existing facility is one of the most important the group will make. It is suggested the trainer ask the group to identify some of the pros and cons of each option.

- 152 Existing housing (including purchase, rental, or lease)

#### Pros:

- It is the quickest and simplest way to achieve needed housing;

- It is less costly than designing and constructing a new facility; and

- It does not require the group to have expertise in housing construction or resources to finance new construction.

#### Cons:

- Appropriate existing structures may not be located in desirable residential neighborhoods; and

- The cost of rehabilitating an existing facility to make it usable and accessible may be excessive.

43-44

- 153 New housing

#### Pros:

- The housing may be the most effective in meeting needs as it has been



specially designed for the resident population group and

- There is increasing interest among public and private housing sponsors and developers in the market for handicapped housing.

Cons:

- Planning, developing, and building new housing is a complicated and time-consuming process and

- Constructing a new facility is the most expensive option in making additional housing available and requires knowledge of housing development and expertise in arranging for the financing needed.

154 In addition to the above pros and cons, the circumstances and conditions within the community will also influence the decision the group will make. These environmental factors include: (1) the urgency of the housing need; (2) the availability and price of existing structures as compared to the cost of designing and building a new structure; (3) resources available to finance the housing; (4) experience and expertise of the sponsoring group and the resources it has available to it; and (5) the level of community interest and support. It would be useful for the trainer to review these factors with the group.

155 After these deliberations, the trainer should ask the group to consider the above factors in relation to the circumstances of the community situation and to decide what is the most feasible approach to take. Once again, the recorder should record the deliberations and decision reached by the group on newsprint.

#### Use of professional assistance?

156 Whether to enlist professional assistance with the planning and development of the housing is an important consideration for a sponsoring group. A new sponsoring group can hardly be expected to have the expertise necessary to handle the many technical aspects of developing housing.



In addition, the process of applying for a mortgage loan and subsidies, obtaining seed money, and planning and building a new facility or rehabilitating an existing structure is a complicated and technical one.

- 157 The decision of whether to hire professional services will depend primarily on: the resources available to the group to hire or co-opt the needed professional services; the type of housing to be developed; and how complicated and technical the considerations are in developing it.
- 158 The important point for the trainer to emphasize to the group is that sponsoring groups need to:
- 1- Assess realistically the technical considerations involved in developing the proposed housing;
  - 2- Assess realistically their resources and capabilities to carry out these technical tasks; and
  - 3- Determine the outside assistance needed and arrange for the assistance in the most economical manner.
- 159 The trainer should then ask the group to list the kind of professional assistance, if any, it feels it would need to consult in developing its housing plan.
- 160 In adjourning the session, the trainer will want to:
- Review quickly the dimensions of the housing the group has defined;
  - Point out that tasks 4, 5, and 7 in the development process have been carried out in this session; and
  - Ask the participants if they plan to attend the evening session on how to conduct a follow-up training program. After the adjournment of the session, this number should be reported to the institute coordinator who then can arrange for an adequately sized room for the meeting.



1:30-5:00 Session V. Investigating Resources for Financing Housing and Services

161 The purpose of this session is to make the participants aware of the sources for financing housing and services and of how to make use of this financing.

162 It is recommended that the information for this session be provided by a panel of housing experts who are engaged in financing housing and who are familiar with service resources and their financing. This session would be directed to the full training body in a plenary session. It is important that the information presented on this subject be the same for all groups regardless of the case situation. Also, the subject matter is of a technical nature and can most appropriately be provided by housing and service experts.

163 It is also considered important that the session be conducted as a presentation of information rather than as a group discussion. The intent of this session is to present important and rather extensive information to the trainees and not to have them contribute to this section of the development process.

23-22

164 The information to be presented by the housing panel is provided, in fully developed form, in chapter III of the guide, "Financing Resources." The housing experts will want to present this information in the following manner: the panel chairperson will provide an overview of the major resources for obtaining seed money, capital financing, and service financing by reading from and referring to pertinent parts of the guide. The two housing finance experts will then provide additional information on actual experience in tapping and consummating financial arrangements. Likewise the service expert will identify the sources and techniques for achieving and financing the service component.

165 Before beginning, the chairperson will want to inform the participants that the session will be conducted as a lecture and



that any questions they may have on the information presented should be recorded on index cards and passed to the recorders for transmittal to the chairperson for answering by one or another of the panel.

- 166 The panel chairperson should also make it clear that the session is not directed to providing specific finance information, such as how to fill out an application for funding. The information presented will deal with the process and procedural aspects of financing housing and services, such as:

- 23-24 1- Identifying sources to provide seed money for planning activities;
- 24-28 2- Identifying sources to finance the housing;
- 28-29 3- Identifying basic budget considerations;
- 29 4- Identifying potential sources for funding or providing services; and
- 30-33 5- Reviewing steps to be followed in obtaining financing for new structures or for purchasing, renting, or leasing existing facilities.
- 167 It is suggested the housing panel be assigned to provide the appropriate information to items 1-4, page 114. After the presentation, a 15 minute break should be allowed, after which written questions from the participants can be entertained.
- 168 The chairperson should adjourn the session at 5:00 and thank the panel members for their valuable contribution to the training.
- 169 The chairperson should also give the room number for the evening session on how to train others.



8:00-9:30 Session VI. Training Others

- 170 The purpose of this session is to discuss how to conduct a training program on housing the handicapped and how to train other persons to become trainers in such programs.
- 171 This session is addressed to those participants who have expressed interest in duplicating the training program for another level of training and in serving as trainers for that program. (Such persons may not comprise the full training body, depending upon the interest of the group.)
- 172 The session is divided into three areas of training:
- 1- How to arrange for a training institute;
  - 2- How to conduct a training program; and
  - 3- How to train others to become trainers.
- 173 It is suggested that this session be conducted as follows:
- 1- The session be held in the evening during the middle of the training program to allow time for additional, follow-up training if necessary;
  - 2- The meeting be conducted as a plenary session if the number of interested participants is small (if the number exceeds 15 persons, two simultaneous sessions are suggested);
  - 3- The training be provided by the lead trainer -- the trainer responsible for training and coordinating the other trainers for the program -- and assisted by the other trainers as needed; and
  - 4- The trainer provide training in the three areas of training specified above by leading the group through the training process and allowing for questions and discussion of the material by the participants.



- 174 The following material illustrates how this session can be conducted and includes the information that should be presented.

Training on the Training Process

- 175 The trainer should begin the training by:
- Explaining the purpose of the session, stated in paragraph 170;
  - Describing the three areas of training, as stated in paragraph 172; and
  - Explaining how the session will be conducted, paragraph 173, point 4.
- 176 Next, the trainer should explain that all the information and materials needed to provide the training have been developed for the trainers and groups interested in sponsoring a training program. These materials are contained in two documents: the guide and the training manual.
- 177 The guide provides the text and resource information for the training and the training manual provides the information and instructions needed to provide the training.
- 178 At this point it would be useful for the trainer to discuss the manual and how it can be used. He/she may wish to pass around copies of the manual to each participant to use during this session. (These copies should be picked up at the end of the evening session. Copies of the manual will be distributed at the end of the training program to those persons who will be replicating the training in their geographical regions.)
- 179 It is suggested the trainer thoroughly review each section of the manual with the group, with the exception of section IV, "The Training Program," which will be discussed in detail later in this session.
- 180 The purpose of each section is explained below:
- I - explains the purpose of the training;
  - II - defines the focus of the training and describes the training technique used;



III - provides instructions and suggestions on how to conduct the training and how to use the manual;

IV - sets forth the complete program needed to provide the training;

V - includes all training aids and materials needed for the training and explains how to use them;

VI - contains the recording forms and instructions on how to prepare them; and

VII - provides suggestions for providing the follow-up training.

181 Reviewing each section of the manual will provide the potential trainers with an understanding of the contents of the manual and how to use it in developing a follow-up training program. Of particular importance for the potential training sponsors is the information discussed in section III, "Use of the Manual."

182 Before proceeding to the discussion of how to arrange for a training institute, the trainer should restate that the manual has been designed as a guide in planning, sponsoring, and conducting a follow-up training program and should be used as a working tool by program sponsors and trainers.

#### Arranging for a Training Institute

183 Arranging for the training to be replicated at the next level in a training sequence will be the primary responsibility of those persons attending this session and the organizations they represent.

184 Suggestions for arranging for a follow-up training institute are provided in section VII of the manual. The trainer should review this information with the group and answer any questions it may have.

#### Conducting the Training Program

185 The major portion of session VI should be devoted to a discussion of how to



conduct the training program, including a discussion of the role of the trainer and how the training program and materials can be used.

- 186 The trainer should review with the group that portion of section III of the manual that deals with conducting a training program, paragraphs 29-42.
- 187 Next, the trainer will want to discuss the role of the trainer in conducting the training program. The trainer should begin this discussion by pointing out that participation in the training program as trainers permits experiencing the training program and witnessing how it should be conducted. The participants are also receiving training in the role of trainer by observing the trainer of their group.
- 188 The trainer should then read through the duties and functions of the trainer as described in paragraphs 34-45 and review the guidelines for the trainer stated in paragraph 43, points 6-12.
- 189 An essential point to emphasize is that the focus of the small group sessions is on the active involvement of the trainees in gaining experience in how to use the process of housing development. The role of the trainer becomes one of guiding the group through the process.
- 190 When the training program is reviewed, the role of the trainer will be further illustrated, and specific suggestions will be made on how to handle the materials and situations that may arise.

#### Reviewing the Training Program

- 191 It is suggested the trainer begin this discussion by explaining how the training program is organized and developed for the trainers' use. The information introducing the training program on pages 12-14 is relevant for this explanation.
- 192 The trainer should then ask the group to turn to session IV in the training program, pages 35-41, and allow a few minutes to read through the program description for this small group session. It would be useful for the group to discuss the program material from the standpoint of



presenting the information, leading discussion, and soliciting information from the participants. The experience of participating in session IV should also be drawn upon.

- 193 The trainers will also need to prepare individually for their training jobs prior to conducting the training program. This will require that the guide and the manual be carefully studied and that the presentation of the training program be adequately prepared. The potential trainers may also find it useful in the remaining training sessions to pay attention to how the trainers present information, lead the group work activity, answer questions, handle various situations, and maintain the time schedule.

#### Training Other Trainers

- 194 The success of the training effort in assisting community groups to develop housing for handicapped persons depends primarily on the interest and ability of those persons who will serve as trainers in the programs. Thus, it is important that the persons serving in this role be well qualified for the task.
- 195 The trainers who attended a previous program as trainees have the experience of participating in the training, which serves as a useful example and training for them in replicating the program. However, conducting a follow-up training program may require that additional trainers, who have not participated in a previous training program, be solicited and trained to assist with the program.
- 196 Utilizing additional trainers will require that:
- The persons chosen to serve as trainers be carefully selected and
  - They be given adequate preparation for their task.
- 197 Some qualities that should be considered in selecting additional trainers are:



- Experience and background in training;
  - Interest and experience with the circumstances of the handicapped population, and in particular their housing needs;
  - Ability to facilitate the conduct of other training programs; and
  - Organizational affiliation to assist with the promotion of the training.
- 198 It is suggested those persons who have experienced a previous training program assume the responsibility of lead trainer for the program and that they assist with the selection of the additional trainers and with training them in how to conduct a training program.

#### Preparation for the Training Task

- 199 The persons selected to serve as trainers should be:
- Officially asked to serve in this capacity;
  - Sent a letter of general explanation about the training institute and their role in it;
  - Sent a copy of the guide and training manual well in advance of the training program to allow time for reading through the documents and becoming familiar with their contents; and
  - Asked to participate in a two-day training session for trainers, to be held in advance of the training program. The purpose of this session would be to go through the training program, session by session, and to instruct the trainers on how the sessions should be conducted.
- 200 The material and discussion in this session, session VI, can be used in providing training to the trainers. Paragraphs 167-193 are relevant and should be reviewed with the trainers. In addition, a complete review of the training program, session by session, should be provided.



201 In concluding session VI, the trainer should:

- Allow the participants to pose any questions they may have;
- Point out that this session provided the initial training on how to conduct a training program and on how to train others. Additional individual preparation on the part of the trainers will also be necessary if the training institute is to be successful.
- Arrange for any additional training the group desires during the evenings of the training program.



FACE SHEET FOR SESSION VII

FOR THE

TRAINERS' USE

ed Day  
5-5:15

Session VII. Describing the Housing

Purpose - Outline the components of the housing

Subject Matter - Physical structure and site  
- Service program  
- Management and tenant selection  
plan  
- Budget and finance plan

Conduct of Session - the trainees will spend the major  
portion of the session working in small subgroups.

The group activity includes:

1- Each subgroup has the responsibility of completing an assignment, which requires the group to go through the process of outlining one component for the housing facility; and

2- Each subgroup will report its assignment information to the full group.

Materials to be Distributed - Item 7

Guide Pages Cited - 49-53; 55-61; 29; 70-74; 4;  
65-70; 28-29; 24-28.



### Third Day

#### 9:00-12:00 Session VII. Describing the Housing

- 202 The purpose of this session is to go through the process of outlining the components of the housing to be developed.
- 203 This is the stage in the development process in which the preliminary organizing, planning, decision-making, and investigating have been completed. It is now time to detail the various components of the housing and how they will be developed.

- 204 These major components of the housing include:

- Physical structure and site;
- Service program;
- Management and tenant selection plan; and
- Budget and finance plan.

- 205 Since time will not permit the entire group to go through the process of detailing each of the components, the following work scheme has been designed to enable the components to be described, within the time available.

206 Work scheme

1- The trainer will explain the purpose of the session (paragraph 202) and will review the information in paragraphs 203-205.

2- The trainer will then divide the participants into subgroups of approximately two to four persons each and will direct each subgroup to separate work areas within the room.

3- Each subgroup will be assigned to work on one of the housing components. To the extent possible, these assignments should be made on the basis of the interest and experience of the participants. There should be at least one person in each subgroup who has some knowledge about the subject matter.



4- The trainer will hand out the appropriate assignment sheet to each subgroup, item 7, and will review the assignment with them.

5- The subgroups will be given two hours to work on their tasks and to record the required information on the assignment report forms. (One member of the subgroup should serve as the working recorder.) In completing the assignments, the subgroups should carefully consider and discuss the information before recording it. The trainer will be available to answer questions and assist the subgroups.

6- The trainer should then reconvene the participants and ask one member from each subgroup to report the group's work efforts from the assignment report form. Each subgroup will be allowed 15 minutes for reporting. When all of the subgroups have reported, the trainees will have received an overview of the process for describing each of the components without actually going through each process themselves. They will also have as a product a full description of the housing.

7- Each subgroup should then transmit the completed assignment report form to the recorder who will transfer the information to section VI of the plan recording form.

207 In concluding the session, the trainer should point out that:

- Although all the information on the housing components could not be detailed by the group, nevertheless it acquired a knowledge of the basic information and process for describing these components and

- Tasks 8, 9, 13, 15 and 17 of the housing development were carried out in this session.

208 The trainer should then direct the participants to the departure location for the afternoon field trip.



12:30-5:30 Session VIII. Field Trip

- 209 The purpose of this session is to provide the participants with the firsthand knowledge of various kinds of housing arrangements that can be developed for handicapped people.
- 210 The organization sponsoring the training program will need to determine the facilities to be visited and will need to make arrangements with these facilities for the tours. The facilities selected should be located close enough to the training site to enable the visits to be made in the time allotted.
- 211 Arrangements will need to be made for an adequate number of buses and drivers to transport the participants. It is also suggested arrangements be made for box lunches for the training group to eat on the bus.
- 212 The housing resource person can serve as the group leader for the field visits: to provide background explanation of the facilities to be visited; to meet the person at each facility who will provide the tour and information on the housing; and to be responsible for maintaining the schedule of the visits.
- 213 Experience has shown that it is important for the trainees to receive background information about the facilities they will be visiting in advance of the tour, in order to derive the maximum value from the field visit.



FACE SHEET FOR SESSION IX

FOR THE

TRAINERS' USE

th Day  
0-12:15

Session IX. Securing Needed Resources

Purpose - Plan for securing necessary funding and support to implement the housing

Subject Matter - Submitting the housing proposal for funding  
- Developing neighborhood support  
- Soliciting support from the housing industry  
- Getting proposal into local HAP  
- Obtaining funding for services  
- Clearing local requirements

Conduct of Session - The trainees will be divided into two groups and will be given an assignment to complete during the session.

The group activity includes:

Completing the assignment, and reporting the information to the entire small group.

Materials to be Distributed - Item 8

Guide Pages Cited - 30-31; 51-52; 3-4; 8-11; 29;  
44-47; 70-71; 59



## Fourth Day

### 9:00-12:00 Session IX. Securing Needed Resources

214 The purpose of this session is to outline a plan for securing the necessary funding and support to implement the housing as described in session VII.

215 This plan should include information on the following activities:

- 1- Submitting the housing proposal for funding;
- 2- Developing neighborhood support;
- 3- Soliciting support from the housing industry;
- 4- Getting the proposal into the local housing assistance plan, if necessary;
- 5- Obtaining funding for the needed services; and
- 6- Clearing zoning, building, and other local requirements.

The approach that is recommended for outlining the plan is described below.

#### 216 Approach

- 1- The trainer will want to explain the purpose of the session and the subject matter to be covered (paragraphs 214-215).
- 2- The trainer will need to divide the participants into two groups of five to six persons each.
- 3- Activities 1, 4, and 6 should be assigned to one group, and activities 2, 3, and 5 to the second group.
- 4- If the participants represent a mix of backgrounds, it is suggested that those persons with a service background be assigned to group 1, and those persons with a housing background be assigned to group 2. This arrangement will enable the participants to acquire and use new information.



5- The trainer should then distribute item 8, session IX, "Plan for Securing Needed Resources," to the groups and ask them to complete those sections of the plan assigned to each.

6- The groups will have 1.25 hours in which to complete their work. (One member of the group should serve as the working recorder.) The trainer should rotate among the groups and provide assistance as needed.

7- The trainer should then reconvene the participants and ask the working recorders to report, from the assignment sheets, the information developed by the group. One-and-one-half hours should be allotted to the two groups for their reporting, and for any discussion and questions from the other group members.

8- Each group should then transmit the completed sheets to the recorder who will transfer the information to section VII of the plan recording form.

217 In adjourning the session, the trainer should point out that:

- The exercise was intended to make the group aware of the need to plan for securing needed support for the housing and to understand some of the considerations in doing so and

- Tasks 10, 11, 12, 14, 16 and 18 of the housing development process were reviewed in this exercise.



FACE SHEET FOR SESSION X  
FOR THE  
TRAINERS' USE

urth Day  
30-4:30

Session X. Implementing the Housing

Purpose - Review procedures for implementing the  
housing plan

Subject Matter - Building, purchasing, renting,  
or leasing  
- Provision of services  
- Implementing management plan  
- Beginning housing management

Conduct of Session - The trainer will lead a group  
discussion, and will ask the trainees to outline  
the procedures for implementing the housing plan.

The group activity includes the group discussion  
described above.

Materials to be Distributed - None

Guide Pages Cited - 31-33; 73-74; 65-70



1:30-4:30 Session X. Implementing the Housing

- 218 The purpose of this session is to review the procedures for implementing the housing plan.
- 219 Implementing the housing plan is the last activity in the housing development process. The components of the housing have been described, the decisions regarding the content of the housing plan and how it will develop have been made, and the policies regarding the management of the housing have been established. It is now time to schedule the development of the housing.
- 220 In this session, the trainer will:
- 1- Explain the purpose of the session, stated in paragraph 18 above;
  - 2- Point out that this is the last activity in the housing development process; and
  - 3- Initiate a discussion around the procedures for implementing the components of the housing plan, and the important points and considerations in establishing and carrying out these procedures.
- 221 The components or aspects of the housing that will be dealt with are:
- Construction of a new facility or the purchase, rent, or lease of an existing structure, including renovations;
  - Provision of personal assistance or service program;
  - Implementation of the management plan, including hiring of staff and selection of residents; and
  - Beginning the management of the housing.
- 222 The trainer will lead the group discussion, as described below, and will ask the trainees to participate actively in outlining the implementation procedures and in identifying important points. The recorder will



record the information identified by the group on newsprint and later will select from this material the information to be recorded on the plan recording form under section VIII.

#### Discussion of Housing Implementation

- 223 The scheduling of the implementation of the housing plan will require skillful planning and coordination on the part of the sponsoring organization. It will also require some of the activities to be carried out simultaneously to ensure a fully completed product by the scheduled completion date.

#### Developing the housing structure

- 224 One of the first activities to schedule is the construction or purchase, lease, or rental of the housing facility. This can be a time-consuming process and should be allotted sufficient time to complete.
- 225 It is suggested the trainer ask the group to outline the procedure for financing and developing their housing facility and to discuss the considerations in carrying out the procedure. The group may wish to refer to pages 31-33 in the guide in discussing this information.
- 226 The steps in the various procedures (constructing, purchasing, renting, and leasing) are underlined below and are followed by a brief statement of the considerations.

#### Constructing a new facility

- 227 After the sponsoring organization has received a firm commitment for either public or private financing for the housing, it will need to undertake the following activities.

##### 1. Complete initial loan closing.

This closing is a legal procedure and should be completed by an attorney prior to the start of construction. It makes it possible for an interim, or construction, loan to be made in the form of a series of advances to cover costs as construction progresses.



## 2. Solicit bids for construction.

The bid and construction award method depends on the requirements of the financing agency and on the size and cost of the structure. Public agencies must advertise for bids and select the lowest and best bid. Nonprofit sponsors may select a builder and negotiate a contract with him. In soliciting bids, the sponsor should:

- Ensure the selection was not made on personal interest;
- Have supportable reasons for the selection; and
- Require the same assurances of performance for private constructors as required in public bidding.

## 3. Begin construction.

After the construction contract has been awarded, the builder can start construction. This stage in the procedure requires periodic inspections and official approval of changes in the construction plans.

## 4. Arrange for final loan closing.

After construction has been completed and approved, the permanent mortgage loan is closed. It is disbursed by the lender to the borrower and repayment of the loan in regular installments begins. This is a legal procedure requiring an attorney.

## Purchase, lease, or rental of an existing facility.

- 228 The procedure for buying, leasing, or renting an existing structure is simpler than for new construction, with renting and leasing being the simplest of all the financing procedures.
- 229 Briefly, the procedure for purchasing an existing structure consists of:
1. Make a tentative budget. The budget will determine the amount that can be spent on the housing and renovations.



2. Engage the services of a real estate broker who will assist with: identifying suitable neighborhoods with buildings for sale; arranging mortgage financing; negotiating a price; and arranging for title clearance and transfer.
3. Select location and building, an activity previously undertaken.
4. Negotiate price. It is important to get a firm estimate of rehabilitation costs, if renovation is necessary.
5. Arrange financing.
6. Consume purchase.
7. Make any needed renovations.

- 230 The procedure for leasing or renting a facility from private owners is the same as the first three steps listed above.

There is the additional step of drawing up and review of lease or rental forms. The rental or lease agreement should be drawn up by an attorney and should specify in writing all details of the transaction: terms, maintenance responsibilities, termination, and any special conditions.

- 231 There are two methods or procedures for leasing or renting public housing facilities:

- 1- To rent or lease one or more apartments in existing low-rent housing projects;
- 2- To use scattered, privately owned dwellings that the public housing authority may lease or rent for the sponsor.

#### Providing the needed services

- 232 The service program for the new housing has been developed in session VII. The plan for obtaining funding and support for it was outlined in session IX. It is now time to schedule the provision of these services in the new housing environment.



233 The trainer should ask the group to identify some of the important points to consider in arranging for the provision of the services for their housing program:

1- There must be sufficient time prior to the operation of the housing to arrange for the provision of the services. Service providers need lead time to design and arrange for the delivery of the services.

2- The scheduling of the provision of the individual services should be carefully arranged to ensure the availability of adequate space to provide the service, and to ensure the services are provided at an appropriate time for the individual.

3- The services program should be flexible to allow the extent and kind of services to vary as the individual's needs change with rehabilitation.

4- Arrangements for the financing and payment for services should be discreetly handled so as to prevent embarrassment to any resident.

5- The provision of services requires skillful coordination and should be the assigned responsibility of the housing manager or other designated staff person.

234 The trainer should then ask the group to describe the arrangements it will need to make in providing for the delivery of the services needed by their housing residents.

#### Implementation of the management plan

235 It will be necessary to begin implementing the management plan prior to the operation of the housing, to allow sufficient time for some important activities to be carried out. Two of these activities are:

- Hiring of staff and
- Selection of residents.

#### Hiring staff

236 If the housing facility is to have any staff attached to it, it is suggested the trainer initiate a group discussion around



the following questions. Possible answers to these questions are provided in the parentheses following the question.

1- What staff positions have been established for your housing program?

2- Who is the first staff person who should be hired? (the housing manager)

3- Who has responsibility for hiring this person? (the governing board of the sponsoring organization)

4- At what time should the housing manager be hired? (in sufficient time prior to the operation of the housing for he/she to carry out the necessary preoccupancy activities and to hire and train the additional staff personnel)

5- Who has responsibility for recruiting and hiring the other staff personnel? (the housing manager with the assistance of a selection panel)

6- What are some of the steps to be taken in hiring the housing staff? (post job notice; supply applications; receive and screen applications; schedule interviews; form selection panel to assist with interviewing and selection; and select and notify staff)

237 In concluding this discussion, the trainer should point out the importance of training for the staff.

#### Selection of residents

238 The plan for selecting residents for the housing has been outlined in session VII. The trainer should now ask the group to identify the important points to consider in scheduling occupancy for the housing:

1- The selection of residents should be made on the basis of established selection policies and criteria;

2- The advertising and application process should begin at least six months before the housing is ready for occupancy to allow time to select the residents and schedule their moving in;



3- The selection plan should be kept flexible enough to achieve full occupancy in a limited time to meet the first mortgage payment from rent income; and

4- The selection procedures for both initial occupancy and replacements should ensure that the rental income received is sufficient to meet operating costs.

239 In concluding this discussion the trainer should ask the group to briefly outline the basic steps in the procedure for selecting housing residents:

- Advertise and/or make personal contacts with potential occupants;
- Take applications;
- Screen applications according to established policies and priorities;
- Select residents;
- Notify residents of selection; and
- Arrange for moving in.

-70

#### Beginning the management of the housing

240 When the housing structure is ready for occupancy, the staff hired, the service program arranged for, and the tenants selected and admitted, the long-term management phase of the housing begins.

241 The trainer will want to point out that the job of managing housing for the handicapped is more complicated because it requires the special needs of handicapped persons to be dealt with in addition to the duties of maintenance, day-to-day upkeep, and rent collection. He/she should also point out the importance of the daily operation of the housing program. It provides the dynamics of the living environment and greatly determines the success of the housing in providing a normalized living situation for its residents.

242 The trainer may want to ask the group to identify some of the daily operations activities. These include:



- Relating to the residents and their needs;
- Providing and utilizing the services;
- Supervising and coordinating the service program;
- Carrying out ongoing management functions;
- Supervising staff;
- Relating to community agencies and resources;
- Ensuring a smooth maintenance operation;
- Moving residents in and out of the facility; and
- Dealing with emergencies.

243 The trainer may also ask the group to discuss some of the first activities a housing manager would undertake in beginning to operate the new housing program. These activities include:

1- Initially meeting with the residents to discuss some of the daily aspects of the housing program, such as the services, schedules, any regulations -- essentially how the environment will function;

2- Encouraging the participation of the residents in the functioning of the housing program and assisting them with organizing a residents' association if they desire; and

3- Establishing an ongoing staff training program.

244 This discussion concludes this session on scheduling implementation of the housing, concludes the group's work on preparing a housing plan, and completes the housing development process.

245 The trainer should adjourn the group and ask them to reconvene at 9:00 the next morning.



- 246 The trainer should spend a few minutes with the recorder at the close of the session to review the plan recording form to ensure that it is complete. The trainer will also want to help the recorder prepare for reporting the group's housing plan in session XII. Item 10, reporting the housing plan, should be carefully reviewed and followed by the recorder in preparing and reporting the plan.



FACE SHEET FOR SESSION XI  
FOR THE  
TRAINER'S USE

th Day  
0-11:30

Session XI. Reviewing the Plans

Purpose - Review the housing plan and prepare for reporting it

Subject Matter - The completed housing plan

Conduct of Session - The recorder will read through the housing plan with the group.

The group activity includes:

- 1- Reading through the housing plan and
- 2- Asking the recorder to report the plan to the full training body in session XII.

Materials to be Distributed - Item 11

Guide Pages Cited - None



## Fifth Day

### 9:00-10:00 Session XI. Reviewing the Plan

- 247 The purpose of this session is to review the housing plan developed by the group, to review the steps taken in developing it, and to prepare for the reporting of the plan.
- 248 The activities to be carried out in this session include:
- 1- The trainer should explain the purpose of the session, stated in paragraph 253 above;
  - 2- It is suggested the trainer ask the recorder to read aloud to the group the housing plan developed by the group to ensure that the plan contains all of the needed information and that it represents the consensus of the group. At this time any final revisions to the plan should be made, and any additional comments on the plan or development process should be recorded.
  - 3- The trainer will want to thank the recorder for his/her diligent and careful work and to acknowledge the quality of the work performed by the group in such a short period of time;
  - 4- The trainer should indicate that the recorder will report the group's housing plan to the full training body in session XII; and
  - 5- The trainer should review the tasks in the housing development process undertaken by the group and point out that:
    - The product of the training not only includes an outline of a housing plan, but also the acquired knowledge and understanding of the development process.
- 249 In adjourning the session, the trainer will want to express his/her appreciation to the group for its participation in the training and indicate the room location for session XII.



10:30-12:30 Session XII. Reporting the Plans

250 The purpose of this session is for all of the participants to receive an account of the four housing plans developed by the small work groups.

251 This meeting will be the final session of the training program and should be presided over by the chairperson of the training institute. The session should be directed to the full training body.

252 Prior to the opening of the session, the recorders for each of the four groups will be asked to convene at a table in front of the room.

253 The chairperson will want to begin the session by:

1- Explaining the purpose of this final session as stated in paragraph 256 above;

2- Explaining what will take place during the session:

Each of the four small work groups will report the essential features of the housing plan developed for the case situation. The recorder for each group will make the report and will have 20 minutes in which to do so.

The chairperson should point out that the plans are not to be evaluated or debated by the other group members. The plans are being reported to enable the participants to hear how different situations and client groups were planned for.

3- Introducing the individuals who will be reporting the plan information and asking the person reporting on case situation 1 to begin. The recorders will use item 12 as the basis for their reports.

254 The chairperson will need to keep track of the time and ask the recorders to conclude their remarks if they extend beyond the 20-minute limit.



- 255 After all the plans have been reported, the chairperson will want to thank the recorders and the groups for their efforts in producing such a fine product in the short time allotted.
- 256 In concluding the training, the chairperson will also want to thank the housing resource person, trainers, and recorders for their contribution to the training.
- 257 The training program should be adjourned by 12:30 or 1:00.



TRAINING  
MATERIALS

- 258 There is a variety of training materials that has been developed to aid the trainers and in presenting and recording the training information and to aid the trainees in carrying out their tasks.
- 259 The following is an index of these materials. Each item is identified by number and title and is briefly described.
- 260 Item 1, "Outline of Plan for Developing Housing for Handicapped Persons," identifies for the trainees the content and major elements of a housing plan and outlines the kind of information they will need to gather and develop. It essentially outlines their task.
- 261 Item 2, "Information Sheet on the Housing Development Process," describes the development process and its use. This information sheet was developed for the trainers' use.
- 262 Item 3, "Guide Reference Sheet," lists for the trainer the guide information, by page number, that is relevant for each of the tasks in the housing development process.
- 263 Item 4, "Housing Plan -- Development Process Reference Sheet," shows the relationship between a plan for developing housing and the process one goes through in preparing the plan. It can be used by the trainer in relating the steps in the process to the elements of the plan.
- 264 Item 5, "Case Situations 1-4," describes the handicapped population, sponsoring group, and conditions within a specified community and outlines the task to be completed by the trainees for that community situation.
- 265 Item 6, "Summary of Case Situations 1-4," summarizes the critical information presented in each case description. These one-page summaries are designed to provide the trainers with an overview and quick reference to the facts in the case situation.



- 266 Item 7, "Session VII, Assignment Sheets," is for the trainees' use in describing the physical structure and site of the housing; the service program; the management plan; and the budget and finance plan.
- 267 Item 8, "Session IX, Assignment Sheet," identifies the work to be done by the trainees during session IX in outlining a plan for securing the necessary funding and support to implement housing.
- 268 Item 9, "Plan Recording Form," provides for the small group recorders a form for recording the housing plan developed by the group.
- 269 Item 10, "Reporting the Housing Plan," provides for the group recorders an outline of the information to be reported from the housing plan to the full training body in session XII.
- 270 A copy of each of the items described above is provided at the end of this section, with the exception of items 9 and 10 which can be found at the end of the next section, section VI.

271 Distribution scheme

The above materials are to be distributed and used in specified sessions throughout the training program.

- 272 The following scheme indicates when each item should be distributed, whom it is to be used by, and the number of copies needed.

<u>Session</u>	<u>Item</u>	<u>Used by</u>
II	1	trainees
III	5	trainees
VII	6	trainer and recorder only
IX	8	trainees
II-XI	9	recorders
XII	10	recorders

- 273 As discussed in section III, the materials will need to be duplicated prior to the training according to the use of the item



and the number of trainees. Using the above distribution scheme, the trainer should organize the materials for distribution as outlined. It should be noted that two copies of item 9, the plan recording form, will need to be provided to each small group recorder.



RECORDING AND  
REPORT FORMS

- 274 · This section provides samples of the forms for recording and reporting the housing plan developed by each group, and includes instructions for completing them.
- 275 These two forms are entitled: "Plan Recording Form," item 9, and "Reporting the Housing Plan," item 10.

276 Plan Recording Form

This form was developed for the recorder's use in recording the plan information developed by the group throughout the training program. The content of the recording form is similar to the "Outline of Plan for Developing Housing for Handicapped Persons," item 1. The plan recording form, however, allows space for the recorder to write down the completed plan information in outline form.

277 Reporting the Housing Plan

This form provides a format for reporting the essential features and information of the housing plan developed by the small group to the full training body. This form is to be used by the recorders in giving an account of the group's housing plan in session XII.

- 278 The following materials are samples of the recording and report forms with accompanying instructions. Both the forms and instructions should be reproduced and distributed to the small group recorders for their use. (Two copies of item 9 should be reproduced for each recorder so that one may be used as a working copy.)



I. FOLLOW-UP  
TRAINING

- 279 The provision of follow-up training to others is an important sequence in the training scheme. It cannot be overemphasized that the success of the training effort depends upon the effective replication of the training program.
- 280 The purpose of this final section in the manual is to offer suggestions on how to make arrangements for the provision for this follow-up training. The material in section III of the manual should be used in conjunction with the material in this section in arranging for a training institute.
- 281 Persons trained in the preceding training program and the organizations they represent could take primary responsibility for arranging and providing the follow-up training.
- 282 The activities they may wish to undertake in carrying out this responsibility are:
- 1- Initially canvass organizations in the area to determine the extent of interest in participating in a training program on housing the handicapped.
  - 2- If sufficient interest is indicated, begin to make plans for sponsoring a training program.
- It is assumed that most sponsoring groups will have experience with organizing conferences and training meetings. Thus, the activities that need to be completed to organize logistically and arrange for a training institute will not be detailed here. It is suggested, however, that a coordinator for the institute be appointed to plan and organize the training institute and to handle logistical arrangements.
- 3- Select a date, location, and facility for the training.
- The date selected should allow sufficient time for the training institute to be planned and organized, for the participants to be selected and invited, and for the training personnel to prepare for conducting the program.



The location for the institute should be accessible to the largest number of potential participants. And, if possible, the facility should be barrier-free to accommodate disabled participants. In addition, the facility will need to contain adequate spaces for the small group sessions and the plenary sessions. Arrangements will also need to be made for overnight accommodations either in or near the training facility.

4- Consider candidates for the training positions of chairman, housing resource person, trainer, and recorder.

It is important that careful consideration be given to the selection of these persons as their capabilities and skills largely determine the success of the training.

5- Invite selected candidates to serve as the personnel for the training program.

6- Determine the categories of participants to be invited to attend the institute, and issue invitations.

A mix of participants from handicapped organizations, the housing field, and training resources, such as university extension programs, should be considered.

In issuing invitations for participation, the potential participants' interest and ability to provide follow-up training should be seriously considered.

7- Provide follow-up communication to the training staff regarding the purpose of the training and their role in it. Distribute the housing guide and training manual.

8- Arrange for a meeting with the trainers to review the training program and to prepare for conducting the program.

9- Also arrange for a meeting with the recorders to brief them on their duties and on the conduct of the training.



10- Provide confirmation of attendance to participants.

11- Distribute preliminary training materials to participants in advance of the training, including the housing guide.

12- Arrange for the printing of the program and other training materials and

13- Prepare for the conduct of the training program, including arranging for registration and for the equipment and materials needed.

283 Throughout the process of arranging and preparing for the training program, the sponsoring group and its training staff will want to utilize the training manual and follow its suggestions and guidelines.



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## OUTLINE OF PLAN

### FOR

#### DEVELOPING HOUSING FOR HANDICAPPED PERSONS

- I. Statement of goal(s) and objectives(s) to which the housing is directed
  - A. Overall goal
  - B. Specific objective(s)
- II. Documentation of need and demand for the housing within the defined geographic area
  - A. Document or project need and demand for the proposed housing
  - B. Outline the steps and considerations in assessing the need and demand
- III. Definition of specific population group to be served
  - A. Describe the characteristics of the population group selected
  - B. List some of the considerations in selecting the client group
- IV. Definition of the proposed housing

Describe some of the early housing decisions regarding:

  1. Size
  2. Type of housing
  3. Location
  4. Type of services
  5. Use of new or existing housing
  6. Use of professionals
- V. Inventory of service and housing resources
  - A. Identify sources for providing seed money for planning activities
  - B. Identify sources for financing housing
  - C. Identify potential sources for funding or providing services
  - D. Outline steps in financing new structures, and purchasing, renting, or leasing existing facilities
- VI. Description of the housing to be developed

Describe the following components of the housing:

  1. Physical structure and site
  2. Service program
  3. Management and tenant selection plan
  4. Budget and finance plan



VII. Outline the plan for securing funding and support for the housing

Identify the steps and considerations in:

1. Submitting the housing proposal for funding
2. Developing the neighborhood support
3. Soliciting support from the housing industry
4. Getting the housing proposal into the local Housing Assistance Plan
5. Obtaining funding for the needed services
6. Clearing zoning, building, and other local requirements

VIII. Outline the procedure and time schedule for implementing housing

Develop a procedure and time schedule for the following activities:

1. Construction of new facility or purchase, rent, or lease of existing structure, including renovations
2. Provision of services
3. Implementation of management plan
4. Beginning management



# INFORMATION SHEET

## ON THE

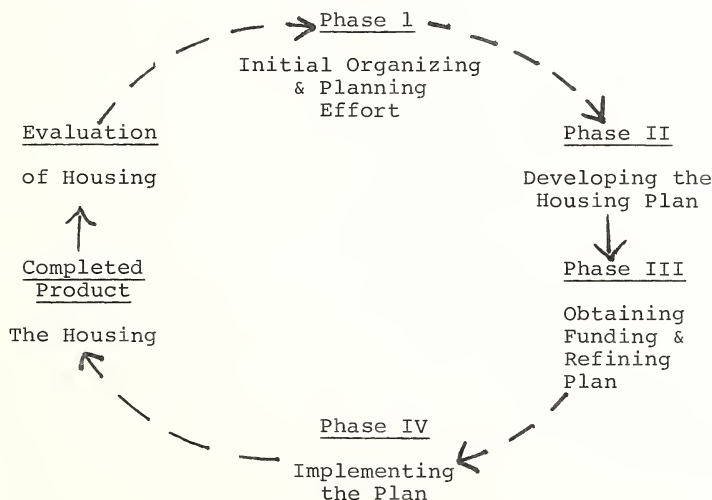
### HOUSING DEVELOPMENT PROCESS

Housing for special population groups is developed through a series of tasks, actions, and procedural steps that collectively constitute a process of housing development.

Webster defines process as a particular method for doing something that involves continuing development through a number of steps or operations. The housing development process discussed in the guide can be described as an orderly method for planning, developing, and managing housing for the handicapped. It: (1) delineates the major tasks or activities that need to be completed in achieving the new housing; (2) provides a sequential ordering of when the task should be undertaken; (3) provides a procedure and guidance for how the tasks can be accomplished; and (4) shows the relationship between the tasks and the movement from the beginning step through to the completed product.

#### The Process:

The process essentially represents four major phases of work activity.



The Housing Development Process

Within each phase, there are specific tasks or actions that need to be accomplished before proceeding to the next work phase.



## Phase I

## Initial Organizing &amp; Planning

- Task 1. Define concept
- Task 2. Become organized
- Task 3. Assess housing market and select client group
- Task 4. Define proposed housing
- Task 5. Consider professional help
- Task 6. Investigate finance resources

## Phase II

## Developing the Housing Plan

- Task 7. Consider design
- Task 8. Identify service resources
- Task 9. Decide on financing plan
- Task 10. Get housing into HAP
- Task 11. Develop support
- Task 12. Clear requirements
- Task 13. Establish financing feasibility

## Phase III

## Obtaining Funding and Refining Plan

- Task 14. Submit proposal for feasibility funding
- Task 15. Prepare work drawings
- Task 16. Complete service package
- Task 17. Prepare management plan
- Task 18. Submit proposal for firm financial funding

## Phase IV

## Implementing the Plan

- Task 19. Construct, buy, rent, or lease
- Task 20. Hire staff and select tenants
- Task 21. Manage housing

Importance of the Process

To achieve housing for handicapped persons, it is essential that one understand and use the housing development process. The current situation shows there is an increasing number of communities eager to provide residential living for their handicapped citizens. However, many are experiencing frustration in undertaking the effort because they are unfamiliar with the process and procedures for developing the housing. Practical knowledge is needed of how to develop a housing plan, determine the specific population to be served, define the dimensions of the housing, obtain financing, and manage the housing. The housing development process provides interested groups with the kind of practical information and guidance needed to develop housing for persons with handicapping conditions.



# GUIDE REFERENCE SHEET

<u>Tasks in Developing Housing</u>	<u>Relevant Guide Information</u> (Referenced by Page Number)
1. Define concept-----	Exhibit 1, XV, 1-2, 4, 11, 14
2. Become organized-----	Bottom of 4-5
3. Assess housing market and-----	35-39, 11-14, exhibits 4 and 5 select client group
4. Define proposed housing-----	4, 17-21, top of 23, 28, 41-47
5. Consider professional-----	6, 35-36 assistance
6. Investigate finance resources----	23, 28; chart 5
7. Consider preliminary design-----	14-21, 55-58, 59-63, 49-50, 52-53 and site
8. Locate service resources-----	29, chart 6, 44-47, 70-71
9. Decide on housing finance-----	29-33 plan
10. Get housing into HAP, if-----	8-11 needed
11. Develop neighborhood support-----	51-52
12. Clear local requirements-----	51, 59
13. Establish financial-----	Exhibits 2, 3, 11, and 12; 28-29, feasibility 32, 33
14. Submit proposal for-----	30 feasibility funding
15. Prepare work drawings-----	55-61
16. Complete service package-----	71-74
17. Prepare management plan-----	65-70, 4
18. Submit proposal for funding-----	31 commitment
19. Construct, buy, rent, or lease---	31
20. Hire staff and select tenants----	67-69
21. Manage housing-----	69-70



## HOUSING PLAN -- DEVELOPMENT PROCESS REFERENCE SHEET

<u>Housing Plan</u>	<u>Development Process</u>
Plan elements:	Tasks:
Preliminary activities	1. Define concept 2. Become organized
Statement of goals and objectives	1. Define concept
I. Documentation of need and demand	3. Assess housing market and select client population
II. Definition of client group	3. Assess housing market and select client population
V. Definition of proposed housing	4. Define proposed housing 5. Consider professional assistance  7. Consider preliminary design and site
Inventory of resources	6. Investigate finance sources Locate service resources
I. Description of housing	9. Decide on housing finance plan 8. Select service resources 13. Establish financial feasibility 17. Prepare management plans 15. Prepare work drawings
II. Plan for funding and support	14. Submit proposal for feasibility funding 16. Complete service package 11. Develop neighborhood support 12. Clear local requirements 10. Get housing into HAP 18. Submit proposal for funding commitment
III. Schedule for implementation	20. Hire staff, implement management plan, and select tenants 21. Manage housing



Case Situation 1

## PLANNING HOUSING FOR THE MODERATELY PHYSICALLY DISABLED

Tipton Falls, Connecticut

Sponsorship

A group of citizens, Concerned Citizens for the Physically Handicapped, has formed a nonprofit housing corporation to develop housing for this population. The action was taken so the group could be eligible for tax-exempt status and for participation in various housing programs and could attract community support. Although newly formed, the group is well organized and has the capacity to bring resources together and facilitate action. Its membership is small but includes consumer representatives of organizations for handicapped persons, two social workers, the chairman of United Way, a local bank manager, a housing developer who built one of the elderly housing projects in town, citizens with physically handicapping conditions, and parents of physically handicapped adults. An attorney and an architect are in the process of being added as members.

In preliminary activities to assess the situation of physically handicapped persons in the city, the group has found that:

- Of the total population of 50,000 some 2,500 persons have physically disabling conditions that restrict their mobility and physical functioning.
- There are no specially designed residential housing arrangements for them.
- Existing buildings and housing have barriers limiting their use by these persons.
- Only limited services and opportunities are available to them.

The group held a community forum to solicit input on the most critical needs of the physically disabled and to focus community attention on these needs.

The group assessed the local market for specialized residential housing for the physically handicapped. After considering whether to make this assessment itself or seek outside help, the group arranged to have it done by social welfare students from a local college. This survey documented the number of persons in need of such housing, their current living situations, their functional capacities, and other characteristics.

Population to be Served

On the basis of this information, the group has selected the moderately physically handicapped as the client group to be served by the proposed housing. The survey indicated there was a large proportion of such persons in need; moreover, because the sponsor is inexperienced in developing housing, it was felt that it would be more practical to develop a small housing facility and direct it to the moderately, rather than severely, physically disabled.



A personal inventory was carried out, again using the college students plus some service agency personnel, to determine the actual demand for the proposed housing -- who not only needed it but would be potential occupants if it were built. Fifty such persons were identified. On this basis it was decided to plan the housing to accommodate 20 men and women.

The potential client group includes individuals, ages 18-30, who have physical disabilities that restrict their mobility, coordination, and movement within the community. All use mobility aids and receive some physical therapy. A few require attendant help. Six are now employed, following completion of vocational rehabilitation, and earn an average of \$300 a month; eight are undergoing training for employment; and six cannot begin training until they complete therapy. The distinguishing characteristic of this group is that with the provision of appropriately designed housing, assistance in performing physical activities of daily living, and training, the individuals can function with considerable independence and can be integrated into ongoing community functioning.

#### Type of Housing to be Developed

The citizens group has decided that the most appropriate type of housing would be a small group home that would provide specially designed individual or shared apartments, common areas, and the required services and assistance with daily living activities.

#### Local Resources, Conditions, and Constraints

. Tipton Falls is a rapidly growing community with a mix of manufacturing and agricultural interests. Employment resources are:

- Construction firms (3)
- Construction materials firms (4)
- Computerized electronic laboratory, employing 200
- Men's shoe factory
- Paper processing factory (small)
- Usual professional and business offices

There are also a scattering of small to medium-sized farms in the area.

. The city government has a:

- City manager
- Planning department (small)
- Zoning board
- Building inspection and permit office
- Housing assistance plan, but no provision in it for housing for handicapped persons
- Building codes without provisions for housing for such persons (although national fire and life safety requirements are being activated)
- Public housing authority that operates one family project for 125 low-income families and two small projects for elderly (a total of 100 units)



Although the city is not opposed to residential housing for physically handicapped persons, it is experiencing rapid internal growth and does not consider that it has the time, resources, or interest to play an active role in developing such housing.

. Among the few social service agencies in the city are:

- County department of public welfare
- Employment bureau operated by the city
- Mental health center, privately-sponsored
- Volunteer bureau
- Catholic social services agency

The closest branch offices of federal or state service agencies are in the state capital, 30 miles away.

At present only limited services are being provided to physically handicapped persons. In fact, the city lacks a well-defined and coordinated service delivery system for most citizens due to the public sentiment that individuals and their families are responsible for meeting service needs, not government or community agencies. There are some signs that this attitude is changing, but progress in increasing and improving service delivery will be slow. A leader in this change is the Catholic social services agency.

. Other local resources are:

- Hospitals (two), one with a physical therapy center and an out-patient clinic
- County medical society
- United Way
- State college (small)
- Public transportation system
- Local chapter of American Institute of Architects
- Central labor council and three craft unions
- Chamber of commerce (active)
- Kiwanis, Rotary, and Lions clubs

TURN TO THE TASK ASSIGNMENT  
ON THE FOLLOWING PAGE



### THE TASK

You are now a member of Concerned Citizens for the Physically Handicapped.

Your task is to complete the plan for developing the proposed housing.  
In completing this plan you need to:

- 1- Identify critical information in the case situation that should be considered and used in developing the plan.  
(An example would be to list those resources that are available and can be utilized in planning for and developing the type of housing proposed.)
- 2- Review the outline of the major elements of the housing plan and select from the case situation the plan information that has already been developed in it. Most of the essential information for elements I, II, and III is in the case description.
- 3- Review the rest of the plan that needs to be developed (elements I-VIII) and the training program that sets forth the schedule for discussion of each element of the plan.
- 4- Begin work on developing the information under element IV. This will require that you:
  - Identify information to be developed under this section of the plan;
  - Analyze considerations in developing this information; and
  - Outline the procedure or steps involved in gathering the needed information and formulating the plan.

When the results have been outlined and recorded on the plan report form by the recorder, proceed to subsequent portions of the plan until it has been completed in its entirety in outline form.

The trainer for your work group will guide you through this process of preparing the plan and will make available various materials to aid you. Also, throughout the process, the trainer will refer you to those pages of the guide that contain information pertinent to the development of respective sections of the plan.

When you have completed your work, you will have:

- Gone through the step-by-step process of planning for housing development;
- Outlined the housing development information in a housing plan form; and
- Received training in how to use the guide as a resource in developing housing.



## Case Situation 2

### PLANNING HOUSING FOR THE DEVELOPMENTALLY PHYSICALLY DISABLED

Fantom, Wisconsin

#### Sponsorship

The local chapter of the United Cerebral Palsy Associations, Inc. is concerned with providing appropriate housing for developmentally disabled adults who have serious physical disabilities but no mental impairments. It has set a five-year goal of working towards normalizing the living environment of the developmentally physically disabled population by providing appropriately designed and serviced residential housing. As a first step in achieving this goal, the chapter last year hired a professional economic analyst to determine the need and demand for such housing among this local population group.

#### Population to be Served

The assessment identified 100 developmentally physically disabled adults in need of specially designed residential housing and interested in residing in it. This group can be described as having substantial physical difficulties with mobility and coordination that require ongoing assistance to carry out activities of daily living. However, they are mentally alert and desire to be part of the community despite their physical impairments. The majority could be employed at tasks requiring minimal physical exertion if training were provided.

These are persons who are now living in nursing homes or are being relocated from state institutions to the community or are homebound because of architectural/environmental barriers or the inability of their family to provide the services that permit community involvement.

The local cerebral palsy chapter presented this information on need and demand to the city and, as a result, the local housing assistance plan (since approved by the HUD area office) includes provisions for housing for 20 such persons this year and housing for an additional 30 within the next five years.

The first group to be housed includes persons aged 18-25, none of whom is employed. The major income source is SSI.

#### Type of Housing to be Developed

The market assessment suggested that the most appropriate housing for this group would be a small group home, a concept that combines individual living units with the support and assistance a person may need to function in an independent or semi-independent manner. It also provides for common facilities and group activities.

When surveyed, most of the potential housing candidates expressed a preference for individual apartments or shared apartments and shared attendants.



the local cerebral palsy chapter, as sponsoring organization, has primary responsibility for preparing the plan for developing the housing. The city and its housing authority are also interested in the proposed housing and have indicated they will provide some technical assistance in developing the plan.

Local financial resources are limited -- federal support will have to be secured. Both Section 202 and Section 8 are being considered as mechanisms for financing the housing.

#### Local Resources, Conditions, and Constraints

- . Phantom (population: 200,000) has a progressive city manager form of government and an active, elected city council. One councilman, who has a 27-year-old son who is severely crippled by cerebral palsy, is very interested in improving conditions for handicapped persons.
- . The public housing authority operates two multi-family projects and one 125-unit high-rise for the elderly. The local housing assistance plan includes a proposal for an additional 200 public housing units -- 50 for the elderly and 125 for families.
- . A well-developed social service network is in place, including programs operated by the:
  - Family service bureau
  - Department of community services
  - Department of health care services
  - Area agency on aging
  - RSVP program
  - Transportation authority
  - State mental retardation office
  - State vocational rehabilitation office
  - State employment office

These agencies have formed a coalition of social service providers.

- . The city's central core has been decaying. Businesses are moving to outlying residential areas, leaving behind shops and houses that can be purchased at minimal cost or for taxes. Street crime is high.

Despite these conditions, public housing projects are located in or near the central core. Service agencies have offices in the mid-city area close to the municipal buildings bordering the dilapidated area. A section behind the municipal buildings is being torn down to make way for an expansion of municipal offices with the use of community development funds.



. The general public has a negative attitude toward integrating moderate to severely handicapped persons into residential areas and community activities.

. Economic opportunities are found in:

- Heavy industry, such as automobile parts manufacturing, a steel mill, and an iron mine
- Publishing company
- Bookbinding operation
- Television and radio stations

There are several large, strong unions.

. Educational opportunities are found in a branch of the state university, a community college, and a university extension program.

. Other assorted facilities include:

- Civic and social clubs
- Movie theaters
- Libraries
- Parks
- Art museums (two)
- Mental health clinic
- Hospitals (three), one with a rehabilitation wing and an outpatient clinic

TURN TO THE TASK ASSIGNMENT  
ON THE FOLLOWING PAGE



## THE TASK

you are now a member of the local united cerebral palsy chapter.

your task is to complete the plan for developing the proposed housing.  
in completing this plan you need to:

- Identify critical information in the case situation that should be considered and used in developing the plan.

An example would be to list those resources that are available and can be utilized in planning for and developing the type of housing proposed.)

- Review the outline of the major elements of the housing plan and select from the case situation the plan information that has already been developed in it. Most of the essential information for elements I, II, and III is in the case description.

- Review the rest of the plan that needs to be developed (elements I-VIII) and the training program that sets forth the schedule for discussion of each element of the plan.

- Begin work on developing the information under element IV. This will require that you:

- Identify information to be developed under this section of the plan;

- Analyze considerations in developing this information; and

- Outline the procedure or steps involved in gathering the needed information and formulating the plan.

When the results have been outlined and recorded on the plan report form by the recorder, proceed to subsequent portions of the plan until it has been completed in its entirety in outline form.

The trainer for your work group will guide you through this process of preparing the plan and will make available various materials to aid you. Also, throughout the process, the trainer will refer you to those pages of the guide that contain information pertinent to the development of respective sections of the plan.

When you have completed your work, you will have:

- Gone through the step-by-step process of planning for housing development;

- Outlined the housing development information in a housing plan form; and

- Received training in how to use the guide as a resource in developing housing.



Case Situation 3

## PLANNING HOUSING FOR THE MENTALLY RETARDED

Monote, Utah

Sponsorship

A group of interested citizens in this rural community desires to provide a small group home environment for six mentally retarded adults, but lacks the knowledge and experience to develop it.

Primary members of the group are the parents of these adults. The parents found they were not able to provide their offspring with the assistance needed to promote growth and foster functioning in the community. It became increasingly apparent that unless an alternative living arrangement were provided soon it would be necessary to resort to institutionalization.

Population to be Served

The six adults experience moderate mental retardation and have potential for self-development. They can take care of personal needs and can be taught to function in a community setting. In fact, they have a strong desire for greater independent functioning. None have physical disabilities that interfere with normal physical activity. All are trainable for modest employment that does not require analytical reasoning or prolonged concentration. All could carry out tasks requiring physical work.

Their living environment needs to be carefully structured so as to provide the supervision and the environmental conditions needed to enhance each person's ability to function and cope with normalized community living.

These adults, ages 19-26, all receive SSI payments and are eligible for training funds. Parents of four of the six are able and willing to make some contribution toward their support in the small group home.

Type of Housing to be Developed

The citizens group first investigated different types of housing for handicapped people and visited a housing facility for the mentally retarded in a nearby community. Then it was decided that a small group home was the most appropriate, practical form of housing to consider. It would provide a home-like, family setting that would offer supports, services, and opportunities to enable residents to function as independently as possible.

As the group began to consider how it would plan to develop such housing, it was clear that in this effort professional assistance would be needed. Among the decisions pending are: Should the housing be new or existing housing, with or without rehabilitation? If it is existing housing, what are zoning considerations?



Local Resources, Conditions, and Constraints

1. Monote, a farming community of 14,000 has limited resources for financing construction of a new housing facility. It does have two small construction firms and one construction materials firm.
2. Its central area has a number of vacant buildings and lots. The affluent residential area is suburban and is located on the surrounding hillside.
3. There is a positive public attitude toward including the mentally retarded in community activities.
4. Municipal government activities and resources include a:
  - Part-time mayor
  - City council
  - Combined city planning, housing inspection, and building permit office with a staff of three
  - No public housing authority or local housing assistance plan
  - Community development funds that are earmarked for general city upkeep
  - Recreation program with leisure time activities for adults and children
  - Library program with bookmobile services
5. Major social service resources are 40 miles away in a large city, but some public and private service agencies have established satellite offices in Monote. Among them:
  - Family service bureau
  - Department of child welfare
  - Mental health clinic (small)
  - Representatives of the department of public welfare and the Social Security Administration
6. Active local community service organizations are:
  - Volunteer Bureau
  - United Way
  - RSVP
  - Goodwill Industries (which has long worked with the mentally retarded and has offered to provide assistance to the citizens group in its planning efforts)
7. Employment opportunities are found in:
  - Picking, processing, and canning fruits grown locally
  - A new plant being built, with a demand for skilled and unskilled labor, as a result of a recent important find of mineral deposits in the area
  - On-the-job clerical training by Goodwill Industries and the Church of Jesus Christ of Latter Day Saints



8. Cultural and educational opportunities are few. A new community college (in operation for two years) has expressed interest in working with the retarded.
9. Recreational opportunities, including hiking, hunting, and fishing, are bountiful in nearby national and state parks. Overnight shelters are available.

TURN TO THE TASK ASSIGNMENT  
ON THE FOLLOWING PAGE



## THE TASK

You are now a member of the group of interested citizens in Monote.

Your task is to complete the plan for developing the proposed housing. In completing this plan you need to:

- 1- Identify critical information in the case situation that should be considered and used in developing the plan.  
(An example would be to list those resources that are available and can be utilized in planning for and developing the type of housing proposed.)
- 2- Review the outline of the major elements of the housing plan and select from the case situation the plan information that has already been developed in it. Most of the essential information for elements I, II, and III is in the case description.
- 3- Review the rest of the plan that needs to be developed (elements I-VIII) and the training program that sets forth the schedule for discussion of each element of the plan.
- 4- Begin work on developing the information under element IV. This will require that you:
  - Identify information to be developed under this section of the plan;
  - Analyze considerations in developing this information; and
  - Outline the procedure or steps involved in gathering the needed information and formulating the plan.

When the results have been outlined and recorded on the plan report form by the recorder, proceed to subsequent portions of the plan until it has been completed in its entirety in outline form.

The trainer for your work group will guide you through this process of preparing the plan and will make available various materials to aid you. Also, throughout the process, the trainer will refer you to those pages of the guide that contain information pertinent to the development of respective sections of the plan.

When you have completed your work, you will have:

- Gone through the step-by-step process of planning for housing development;
- Outlined the housing development information in a housing plan form; and
- Received training in how to use the guide as a resource in developing housing.



Case Situation 4

## PLANNING HOUSING FOR THE MENTALLY AND PHYSICALLY DISABLED

Centerville, Virginia

Sponsorship

The Salvation Army's Bureau of Social Services for the county of Centerville has long been active in working to assist handicapped citizens to live as normally as possible in a residential and community setting. Its efforts are now directed toward persons who are both physically and mentally disabled, a group identified in the bureau's working experience as in great need of assistance.

Population to be Served

Although no formal survey was conducted, it is estimated that there are at least 30 physically and mentally disabled persons in the county who need a specially designed supportive living environment and would be interested in residing in it if it were available. The bureau has determined that it is practical to initially develop housing for 18 of them.

The needs and characteristics of the potential client group were carefully considered. Persons in this group have moderate physical handicaps, such as motor difficulties, as well as moderate to borderline mental impairments. All require some assistance in performing activities of daily living, but not constant attendant care. However, they will require a supervised and supportive living environment with ongoing training. It is considered important that persons to be accommodated have a strong desire for independent living and have potential skills for independent or semi-independent functioning.

The group includes persons between ages 18-25 with SSI as the sole income source at present.

Type of Housing to be Developed

Based on these considerations, the bureau decided to develop three residential dwellings, each accommodating six persons. This concept would enable them to live in a small group, home-like setting, thus helping to promote normalized living. At the same time, it would enable the services and rehabilitation training to be fashioned to individual needs.

The bureau has not yet determined whether the dwellings should be located in the same area or be dispersed throughout the community, or whether they should be new or existing housing, with or without rehabilitation.



Local Resources, Conditions, and Constraints

1. Centerville (population 22,000) is the county seat of an agricultural area with large farms and several small townships. It serves as the business, service, and social center for the county's outlying population (10,000).  
  
County government works closely with the town fathers. Both share a small planning staff. Many area planning activities are jointly undertaken. The county tax rate is the lowest in the state.
2. The municipal government has a:
  - Full-time mayor
  - Elected town council
  - Zoning board made up of prominent citizens
  - Active recreational and library outreach programs
  - No public housing authority or local housing assistance plan
3. The traditional attitude reflected in both city and county is that government's responsibility to citizens is to provide protection such as police and fire services. Only recently has it been considered that this responsibility embraces the social well-being of citizens as well.
4. Because of this, social services available in the area have been quite limited. Those that do exist are provided by:
  - County public welfare department
  - County public health department
  - Volunteer bureau (which sponsors a home visitation program, a limited minibus transportation system, and an information referral and counseling service)
  - Visiting nurses association
  - Salvation Army, Bureau of Social Services (the most active of these agencies, considered to be the leader in promoting the delivery of services throughout the county)
5. There are no construction firms in the town or county, but housing resources include:
  - A Farmers Home Administration office which has financed both sales and rental housing in the city and county
  - Housing Assistance Council which has provided seed money for planning and development activities for some of the housing programs
5. Employment opportunities are found in:
  - Dairy farms, milk and cheese processing (major industries)
  - Government activities
  - Community businesses
  - Skiing and recreational facilities in the nearby Blue Ridge Mountains
  - Tourist facilities for those visiting historic sites



7. Health care services in the county are a county-operated nursing home and one private general hospital, with more extensive care facilities 50 miles away in Richmond.

Some in-home medical and therapeutic services are provided by the Visiting Nurses Association and public health nurses.

TURN TO THE TASK ASSIGNMENT  
ON THE FOLLOWING PAGE



## THE TASK

You are now a member of the Salvation Army's Bureau of Social Services.

Your task is to complete the plan for developing the proposed housing.  
In completing this plan you need to:

- 1- Identify critical information in the case situation that should be considered and used in developing the plan.  
(An example would be to list those resources that are available and can be utilized in planning for and developing the type of housing proposed.)
- 2- Review the outline of the major elements of the housing plan and select from the case situation the plan information that has already been developed in it. Most of the essential information for elements I, II, and III is in the case description.
- 3- Review the rest of the plan that needs to be developed (elements I-VIII) and the training program that sets forth the schedule for discussion of each element of the plan.
- 4- Begin work on developing the information under element IV. This will require that you:
  - Identify information to be developed under this section of the plan;
  - Analyze considerations in developing this information; and
  - Outline the procedure or steps involved in gathering the needed information and formulating the plan.

When the results have been outlined and recorded on the plan report form by the recorder, proceed to subsequent portions of the plan until it has been completed in its entirety in outline form.

The trainer for your work group will guide you through this process of preparing the plan and will make available various materials to aid you. Also, throughout the process, the trainer will refer you to those pages of the guide that contain information pertinent to the development of respective sections of the plan.

When you have completed your work, you will have:

- Gone through the step-by-step process of planning for housing development;
- Outlined the housing development information in a housing plan form; and
- Received training in how to use the guide as a resource in developing housing.



## SUMMARY OF CASE SITUATION 1

### PLANNING HOUSING FOR THE MODERATELY PHYSICALLY DISABLED

Tipton Falls, Connecticut

#### Community Size and Characteristics

rapidly growing community of 50,000 people with a mix of manufacturing and agricultural interests.

#### Population to be Served

twenty moderately physically disabled adults, ages 18-30, who have restricted mobility and coordination, but who have the capacity to live an independent life if provided with the appropriate living arrangement

#### Type of Housing to be Developed

small group home facility, or assisted living environment in a residential setting, that would provide specially designed individual or shared apartments, common areas, and needed supportive services

#### Sponsoring Group

Concerned Citizens for the Physically Handicapped, Inc., a newly created organization that was formed for the purpose of developing suitable housing for the physically handicapped. The group has a representative membership, is well organized, and has the capacity to attract resources.

#### Assessment of Local Housing Market

An assessment of the need and demand for the proposed housing was conducted by a class of social welfare college students. A personal inventory survey was also carried out to identify potential occupants. The assessment documented the demand to be fifty persons.

#### Available Resources

- . Strong sponsoring group with capacities to develop housing
- . Existence of a public housing authority, a local housing assistance plan, and public housing facilities for families and for elderly
- . Existence of three construction firms and a variety of manufacturing businesses

#### Constraints

- . Limited availability of services and potential service providers
- . Rapid internal growth experienced by the city and their lack of time, resources, or interest to contribute to the development of the proposed housing
- . Public sentiment that individuals and their families have responsibility for filling service needs and not government or community agencies.



## SUMMARY OF CASE SITUATION 2

### PLANNING HOUSING FOR THE DEVELOPMENTALLY PHYSICALLY DISABLED

Fantom, Wisconsin

#### Community Size and Characteristics

A predominantly industrial and manufacturing oriented community of 100,000 people

#### Population to be Served

A group of twenty developmentally disabled persons aged 18-25 with substantial physical disabilities but not mental impairments

#### Type of Housing to be Developed

A small group home facility, a concept which combines individual living units with the common facilities and supports needed to function in an independent or semi-independent manner

#### Sponsoring Group

The local chapter of the United Cerebral Palsy Association, Inc., an established organization which has been active in working with the developmentally disabled

#### Assessment of Local Housing Market

The sponsoring group hired a professional analyst to determine the need and demand for specially designed residential housing for the developmentally physically disabled within the community. The assessment documented the demand to be 100 persons.

#### Available Resources

- . Established sponsoring group with capacities to develop housing
- . Interest of the city and housing authority in the proposed housing and their offer to provide some technical assistance with developing the housing plan
- . Availability of a well-developed social service delivery system
- . Rehabilitation hospital

#### Constraints

- . Negative attitude on the part of the general population of Fantom to incorporate the handicapped into residential areas and community activities
- . Lack of local financial resources
- . Decaying conditions in the central core of the city which have resulted in business establishments moving from the downtown area to the outlying residential area leaving abandoned shops and houses which are purchasable for minimal cost. (This condition can be considered a resource as well as a constraint.)



### SUMMARY OF CASE SITUATION 3

#### PLANNING HOUSING FOR THE MENTALLY RETARDED

Monote, Utah

##### Community Size and Characteristics

Small, rural, agricultural community of 14,000 people

##### Population to be Served

Six adults, ages 19-26, who experience moderate mental retardation, but who have no physical disabilities and have the potential for self-development

##### Type of Housing to be Developed

Small group home that would provide a supervised and structured environment to enhance the individual's ability to function and cope with normalized community living

##### Sponsoring Group

Local group comprised primarily of parents of the six mentally retarded potential housing occupants plus other interested community persons. The group formed specifically to provide appropriate housing for the client group.

##### Assessment of Local Housing Market

No formal assessment of the local housing market was conducted. The housing is being planned because of the known immediate need for specially designed residential housing for the six individuals.

##### Available Resources

- . Positive public attitude towards including the mentally retarded in community activities
- . Availability of vacant buildings in the central area of town that could be used for a small group home
- . Potential opportunities for employment of client group in the fruit processing plants
- . Offer of assistance from the Goodwill Industries

##### Constraints

- . Inexperience and lack of resources of sponsoring group
- . No public housing authority, housing assistance plan, or urban renewal program
- . Limited local resources for financing construction of a new housing facility



## SUMMARY OF CASE SITUATION 4

### PLANNING HOUSING FOR THE MENTALLY AND PHYSICALLY DISABLED

Centerville, Virginia

#### Community Size and Characteristics

A town of 22,000 people and the county seat of a predominantly agricultural area which contains a population of an additional 10,000 people

#### Population to be Served

Persons who have both moderate physical and mental impairments that require a supervised and supportive environment to carry out activities of daily living. Eighteen persons, ages 18-25, with these characteristics are being considered for the housing.

#### Type of Housing to be Developed

An arrangement of three residential dwellings each accommodating six people in a small group home setting

#### Sponsoring Group

The Salvation Army's Bureau of Social Services for the county of Centerville, an established organization that has been active in improving the circumstances of handicapped people and in promoting needed service delivery to the general population

#### Assessment of Local Housing Market

No formal assessment of the local housing market was conducted. Estimates of the need and demand for the housing were made based on the past work efforts of the bureau with the physically and mentally handicapped population. The estimated demand was at least 30 persons.

#### Available Resources

1. Close cooperation and working relationship between the city and county government
2. Close proximity and access to the Farmers Home Administration office
3. A housing assistance council which has provided seed money for planning and development activities for some housing programs
4. Experience of the sponsoring organization and their involvement with social services programs

#### Constraints

1. No public housing authority, housing assistance plan, or construction firms in the area
2. Traditional attitude that government's responsibility to its citizens is to provide protective services not social welfare or housing services
3. Limited availability of social services and health care services



## Session VIII. Assignment Sheet

for

## Describing the Physical Structure and Site

Assignment: Describe the site and physical structure of the housing to be developed.

- a. Read through the attached outline on physical structure and site. This outline identifies the information you need to develop.
- b. Re-read pages 49-53 and 55-61 of the guide.
- c. Using the information from the guide, the case situation, and your own thinking, complete the attached outline. Use additional paper as needed.

Carefully consider the conditions, resources, and constraining factors within your case situation in designing this aspect of the housing.



Assignment Report Form

Outline

of the

Physical Structure and Site of the Housing

The general location of the proposed housing was selected in session IV. You now need to secure the particular site, land, and/or building, to proceed with your development efforts. Identify those activities you need to carry out to secure the site.

- I. State the four general design directives or principles that should guide the development of any housing facility for handicapped persons.

- II. Describe the nature of the physical structure for the housing your group is developing.

You should use the checklist of the major elements of an architectural program (pages 55-56) in describing the structure, whether new or existing, and should:

1. Consider each element in the architectural program;
2. Decide whether the element has relevance for your housing; and, if so
3. Describe it as best you can.

he subject matter discussed in pages 56-58 will be useful to refer to as you consider and describe the elements. And for some groups the descriptive information on group homes, pages 59-61, may be useful.



Session VIII. Assignment Sheet  
for  
Describing the Service Program

Assignment: Describe the program of services to be provided to residents of your housing facility.

- a. Read through the attached service program outline. This outline identifies the information you need to develop.
- b. Re-read pages 29 and 70-74 in the guide.
- c. Using the information from the guide, the case situation, and your own thinking, complete the attached outline of the service program. Use additional paper as needed.

Carefully consider the conditions, resources, and constraining factors within your case situation in designing this aspect of the housing.



Assignment Report Form

Outline of Service Program

Identify and briefly describe the services that will be made available to the residents of your housing facility.

Note: When this information has been developed, please transmit it to the other subgroups. (Record on board.)

Specify whether these services will be provided in-house or by community or other providers. If possible, identify these outside service providers.

- I. Outline the proposed scheme for financing the services, identifying the contribution of each source.

Set forth the goal of the above-described service program, and discuss the benefits the client group will derive from the program.



Session VIII. Assignment Sheet  
for  
Describing the Management Plan

Assignment: Describing the plan for managing the proposed housing and selecting the residents for it.

- a. Read through the attached outline on management. This outline identifies the information you need to develop.
- b. Re-read pages 4 and 65-70 of the guide.
- c. Using the information from the guide, the case situation, and your own thinking, complete the attached outline. Use additional paper as needed.

Carefully consider the conditions, resources, and constraining factors with your case situation in designing this aspect of the housing.



Assignment Report Form

Outline of Management Plan

- I. Describe the distinguishing characteristics of handicapped housing management.
- II. Outline the staffing plan for the housing. Specify the number and type of staff persons needed to manage the housing.
- III. Discuss some of the characteristics and duties of managers of handicapped housing.
- IV. Outline a plan for selecting the residents for a housing facility.  
  
Although the client group has already been selected for your housing program, what are the:
  - a. Desired goals of any resident selection and placement policy; and
  - b. Steps and considerations involved in selecting the residents.
- V. Define the major elements of management policies regarding:
  - a. Termination of residency and
  - b. Resident participation and organizations.



Session VIII. Assignment Sheet

for

Describing the Budget and Finance Plan

Assignment: Describe the essential features of the budget and finance plan for your housing facility.

- a. Read through the attached outline. This outline identifies the information you need to develop.
- b. Re-read pages 28-29 and 24-28, in the guide.
- c. Using the information from the guide, the case situation, and your own thinking, complete the attached outline. Use additional paper as needed.

Carefully consider the conditions, resources, and constraining factors within your case situation in designing this aspect of the housing.



Assignment Report Form

Outline of the Housing Budget and Finance Plan

- I. Identify the essential items in a housing budget.
  
  
  
  
  
  
  
  
  
  
- II. Identify the source(s) of income of your client group.
  
  
  
  
  
  
  
  
  
  
- III. Briefly explain how a sponsoring group determines the extent of financing needed to build (or rent, lease, purchase, and/or renovate) and operate a housing facility.
  
  
  
  
  
  
  
  
  
  
- IV. Outline the source(s) and methods(s) to be used to finance your proposed housing.



## Session IX. Plan for Securing Needed Resources

Instructions

For each of the following activities, you are being asked to outline a plan for securing the necessary funding and support to implement the housing. This will require that you review the designated guide information, select from this information the considerations, important points, and procedures asked for, and record the information on the attached sheets.



Submitting the proposal for funding

- a. Review the guide information on pages 29-31 and 32-33.
- b. Outline the procedure that should be followed for your proposed housing. Sepcify whether the funding is for a new or existing facility.



. Developing neighborhood support

- a. Review the guide information on pages 51-52.
- b. Briefly list the purpose of a neighborhood education program.
- c. Outline some of the steps that can be taken to further neighborhood support for the housing.
- d. Identify fears or misconceptions a neighborhood may have towards persons with handicaps that may hinder development of the housing if not recognized.
- e. Do you think a neighborhood education program is necessary or desirable for the housing your group is developing?



. Soliciting support from the housing industry

- a. Review the guide information on pages 3-4.
- b. Indicate the importance of enlisting support for your housing from established developers.
- c. Outline the steps a local sponsoring group should follow in approaching housing developers.



4. Getting proposal into local HAP, if necessary

- a. Review the guide information on pages 7-9.
- b. Under what conditions must a proposal for developing housing for the handicapped be included in the local HAP?
- c. Is it necessary for your housing proposal to be included in the local HAP?
- d. Outline the steps that may assist nonprofit sponsors in having their housing proposal included in the local HAP.
- e. List some of the sources that can provide assistance in developing the request for inclusion and having it accepted.
- f. List some of the factors that both help and hinder a proposal to be accepted for inclusion.



5. Obtaining funding for the needed services

- a. Review the guide information on pages 3-4, 29, and 70-74.
- b. Identify some of the sources for financing or providing services.
- c. List considerations in determining whether to provide services in-house or to utilize existing services or service providers available in the community.
- d. List some approaches you might take in obtaining the financing or service provision needed by the residents in your proposed housing.



6. Clearing zoning, building permit, or other local requirements

- a. Review the guide information on pages 51 and 59.
- b. If a request for re-zoning or for a variance is required, what steps might you take to assure the request is granted?

- c. Do building codes and standards vary depending on the type of housing?

If yes, how and why do they vary?

- d. In what ways do zoning and building regulations affect the proposed housing?

- e. Identify the zoning, building or other requirements, if any, that your sponsoring group must deal with in implementing the housing proposal?



## INSTRUCTIONS

for

### COMPLETING THE PLAN RECORDING FORM

The recorder for each small group has the responsibility for completing the attached plan recording form for the plan developed by the group for their case situation.

Each small group session is directed to developing the required information for one section of the plan. It is the duty of the recorder to write down the plan information as it is developed by the group and to record the completed information on the recording form at the end of the session.

In carrying out this activity, the recorder needs to:

- Carefully read through the plan outline so that he/she is familiar with the contents and can answer questions regarding the information requested;
- Listen carefully to the deliberations of the group and record the information developed by them accurately and concisely. This may require the recorder to pose questions to the group to clarify the information.
- Identify any of the plan information that has been overlooked by the group and bring that to the trainer's attention;
- Record only the specific information called for in the plan and put it in the form required in the housing plan outline. This may require the recorder to summarize or consolidate the information prepared by the group.

There are two sections of the plan for which the required information will have already been developed. These sections are I, "Statement of Goal(s) and Objective(s)," and V, "Inventory of Service and Housing Resources."

Once all of the plan information has been recorded at the end of session X, the recorder should carefully review the plan outline with the trainer to ensure that it is complete and that it accurately reflects the thinking of the group.

Two copies of the form will be provided to the recorder. One is to be used during the training as a working copy to record the plan information as it is developed. The second copy is to be used as the completed and final outline of the housing plan. The recorder will need to transfer the information from the working copy onto the final plan outline.



Plan Recording Form

OUTLINE OF HOUSING PLAN FOR CASE SITUATION 1

I. Statement of goal and objectives to which the housing is directed

Overall goal:

To increase the opportunities for persons with moderate physical disabilities to participate as independently as possible in community and residential living in appropriately designed and serviced housing

Specific objectives:

To plan, develop, and manage a small group home facility in a residential setting in Tipton Falls, Connecticut, for 20 moderately physically handicapped men and women

I. Documentation of need and demand for the housing within the defined geographic area

Document or project need and demand for the proposed housing.

Outline the steps and considerations in assessing the need and demand.



Plan Recording Form

OUTLINE OF HOUSING PLAN FOR CASE SITUATION 2

I. Statement of goal and objectives to which the housing is directed

Overall goal:

To increase the opportunities for persons who are seriously physically disabled to participate as independently as possible in community and residential living in appropriately designed and serviced housing

Specific objectives:

To plan, develop, and manage a small group home facility in a residential setting in Fantom, Wisconsin, for 20 adults who have serious physical disabilities but no mental impairments

II. Documentation of need and demand for the housing within the defined geographic area.

Document or project need and demand for the proposed housing.

Outline the steps and considerations in assessing the need and demand.



Plan Recording Form

OUTLINE OF HOUSING PLAN FOR CASE SITUATION 3

I. Statement of goal and objectives to which the housing is directed

Overall goal:

To increase the opportunities for mentally retarded individuals to participate as independently as possible in community and residential living in appropriately designed and serviced housing

Specific objective:

To plan, develop, and manage a small group home in a residential setting in Monote, Utah, for six adults who are moderately mentally retarded and have potential for self-development

II. Documentation of need and demand for the housing within the defined geographic area

Document or project need and demand for the proposed housing.

Outline the steps and considerations in assessing the need and demand.



Plan Recording Form

OUTLINE OF HOUSING PLAN FOR CASE SITUATION 4

. Statement of goal and objectives to which the housing is directed

Overall goal:

To increase the opportunities for persons with both mental and physical disabilities to participate as independently as possible in community and residential living in appropriately designed and serviced housing

Specific objective:

To plan, develop, and manage three small group homes in residential settings in Centerville, Virginia, for 18 persons who have moderate physical disabilities and moderate mental impairments

I. Documentation of need and demand for the housing within the defined geographic area

Document or project need and demand for the proposed housing.

Outline the steps and considerations in assessing the need and demand.



I. Continued (if needed)



III. Definition of specific population group to be served

Describe the characteristics of the population group selected.

List some considerations in selecting the client group.



V. Definition of the proposed housing

Describe some of the early housing decisions made regarding:

Size -

Type of housing -

Location -

Type of Services -



IV. Continued

New or existing housing -

Professional assistance -



v. Inventory of resources to finance housing and services

Identify sources for providing seed money for planning activities:

1. HUD Section 106 Program, Part B authorizes the HUD secretary to make no-interest loans to nonprofit organizations for planning expenses up to 80 percent of estimated preliminary costs.
2. Housing Assistance Council provides seed money to some local groups in rural areas to build or rehabilitate housing for rural low-income families, including the handicapped.
3. State sources, such as state housing finance agencies in sister planning agencies, have funds for seed money loans in some states.
4. Local groups such as large investors, local nonprofit housing development agencies, private foundations, and community development block grant funds, may also be a source for securing seed money.

Identify sources for financing housing:

1. HUD Section 8 rent allowance program
2. HUD traditional rental public housing
3. HUD Section 202: rental housing for elderly or handicapped persons
4. HUD Section 231: rental housing for elderly or handicapped persons
5. HUD Federal Housing Administration 221(d) (3) and (4) market rate rental housing
6. Farmers Home Administration Section 515: rental housing program for rural areas and small towns
7. Farmers Home Administration Section 502: sales for rural housing program
8. Veterans Administration home loan programs
9. State housing finance agencies
10. Conventional financing through banks

Identify potential sources for funding or providing services:

1. The Social Security Act programs, such as disability insurance, supplemental security income program, Title XX social services program, Medicaid, Medicare, social services payments program for room and board, and vocational rehabilitation services
2. The Developmental Disabilities Act of 1975
3. The Rehabilitation Act of 1973
4. The Urban Mass Transportation Act
5. The Older American Act programs



Continued

Outline steps in financing:

New structures -

1. Make contacts to ascertain feasibility of proposed plan.
2. Arrange a pre-application conference.
3. Make a site appraisal and market analysis.
4. Apply for a conditional commitment for funding.
5. Apply for a firm commitment for funding.
6. Arrange for initial loan closing.
7. Solicit bids for construction.
8. Begin construction.
9. Arrange for the final loan closing.
10. Begin management operations.

Purchase of existing structures -

1. Make a tentative budget.
2. Engage the services of a real estate broker.
3. Select a location and building.
4. Negotiate price.
5. Arrange financing.
6. Consummate purchase.
7. Begin the management process.

Lease or rental of existing facilities from private owners -

1. Prepare a budget.
2. Identify potential location and dwellings.
3. Choose preferred location and dwellings.
4. Draw up and review rental or lease agreement.
5. Select tenants, initiate management plan, and begin the provision of services.

Lease or rental of existing public housing facilities -

1. Lease or rent one or more apartments in existing low-rent public housing projects.
2. Arrange for the public housing authority to lease scattered, privately owned dwelling for use by the sponsor.



VI. Description of the housing to be developed

Describe the following components of the housing:

Physical structure and site -

Service program -



VI. Continued

Management and tenant selection plan -

Budget and finance plan -



VII. Outline of plan for securing funding and support for the housing

Identify the steps and considerations in:

Submitting the housing proposal for funding -

Developing neighborhood support -

Soliciting support from the housing industry -



VII. Continued

Getting housing proposal into the local HAP, if necessary -

Obtaining funding for the needed services -

Clearing zoning, building, and other local requirements if necessary -



VIII. Outline of procedure and time schedule for implementing the housing

Develop a procedure and schedule for the following activities:

Construction, or purchase, rent, or lease (including renovations) -

Provision of services -



III. Continued

Implementation of management plan -

Beginning management -



### Reporting the Housing Plan

Each small group recorder has the responsibility for reporting the housing plan developed by his or her group to the full training body in the final plenary session, session XII.

In reporting the plan, the recorder may wish to use the following outline. The outline sets forth the major categories of information that describe the essential features of the plan. It does not include all of the plan information developed by the group, since some information is common among all the plans and hence does not need to be presented again. Only the information pertinent to planning housing for the individual case situation should be reported.

On completion of the housing plan in session X, the recorder can begin to prepare for the reporting of the plan. He/she will need to read through the completed housing plan and case situation and, following the outline, select from these documents the pertinent information to be reported.

#### Outline

1. Using the case description, briefly describe your case situation communicating the essential information such as the size and characteristics of the community; characteristics of the population group to be served; type of housing to be developed; description of the sponsoring group; need and demand for the housing; availability of resources to assist with the development of the housing; and potential constraints that need to be overcome.
2. State the objective(s) of your housing program.
3. Describe the early decisions that were made regarding the proposed housing, such as size, location, services, use of new or existing facilities, and use of professionals.
4. Describe the major components of the housing to be developed -- physical structure and site, service program, management and tenant selection plan, and budget and finance plan. Indicate how the resources were used and the constraints overcome in designing the components.
5. Indicate how the housing arrangements will be financed and implemented.
6. Include throughout your presentation any interesting experiences your group had in working through the development process.



PROGRAM AND TRAINING INSTITUTE FACULTY

NAHRO National Training Institute on Housing  
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East Lansing, Michigan  
May 2-6, 1977

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